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Right Hon. C. D. Howe
Minister of Trade and Commerce

M. W. Mackenzie
Deputy Minister

FOREIGN TRADE

OTTAWA, MAY 7, 1949

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COVER SUBJECT—Asbestos being loaded aboard the S.S. *Manchester Port*, at Wolfe's Cove, Quebec, for shipment to the United Kingdom. Exports of asbestos and asbestos products last year were valued at $41,979,000, of which the United States was the principal purchaser. Shipments of asbestos milled fibres were made to thirty-two countries; of asbestos waste, refuse and shorts to fourteen countries; of asbestos brake lining facings to forty-six countries; of asbestos packing to eleven countries; and of crude asbestos to seven countries.

National Film Board Photo.

Price 10 cents

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Canadian Market for Engineering Equipment Stressed in Britain

Right Hon. C. D. Howe, visiting British Industries Fair in London and Birmingham, tells of opportunities for sale of manufactures in this country, and describes some of the problems involved in development of trade—Provision of raw materials in greater volume from colonial areas suggested.

CANADIAN businessmen welcome the growing interest among British manufacturers in the market here for engineering equipment and machine tools. This observation was made by the Right Hon. C. D. Howe, Minister of Trade and Commerce, in Birmingham last Thursday, when he addressed a number of fellow engineers and industrialists attending the British Industries Fair. He pointed out that purchases of machinery and equipment from the United States exceeded in value the total of all Canadian purchases from the United Kingdom. If Canada was enabled to obtain a larger volume of engineering products from Great Britain, purchases from the United States could be reduced. This would assist in solving Canada's foreign exchange problem, and enable her to increase the volume of exports to the United Kingdom.

The Minister of Trade and Commerce explained that the Canadian businessman had noted a healthy recovery in the shipment of British coal and steel to Canada. He was rather concerned over the fact that a large part of Britain's exports for dollars consisted largely of luxury lines, such as fine shirtings, fine worsteds, china, automobiles and other similar products. The Canadian businessman realized there was a limit to the purchases of such items, and that luxury lines were particularly vulnerable to the customer's ability to spend freely.

Canadian prosperity, with its high level of business activity, was supported by twin pillars, namely exports and a high rate of capital investment. The high level of capital investment could assist in stimulating British sales to Canada, and help to maintain a high volume of exports to the United Kingdom.

Attempt Made to do too Much too Quickly

"Since the end of the war, we have been attempting to do too much too quickly", the Minister continued. "On the whole, the success that we both have achieved exceeds that of any similar period in history, but the work is far from ended. In Canada, after several years of a high level of new investment for plant and equipment, our official estimates of capital investment in 1949 indicate an expenditure of £825 millions, which is 10 per cent higher than the level in 1948. The estimate indicates an expenditure of £500 millions for new construction and £325 millions for new machinery and equipment. While investment in new productive capacity is levelling off, investment in public projects, such as utilities, housing and transportation is still on the increase."

There was no doubt but that Canada was still a fertile field for new investment, Mr. Howe informed his audience, suggesting at the same time that British businessmen consider exploring the possibilities for themselves. "Our population is growing, both from natural increase and from immigration. There is under way a continuing process of change from a

Engineering equipment, manufactured in Great Britain, is sought by Canada to meet needs of industry and new developments. Minister of Trade and Commerce urges British businessmen to explore the Canadian market in an effort to reduce the trading gap.

primarily agricultural economy to an industrial economy. Our still undeveloped wealth of mineral resources is making its contribution, as illustrated by the proving up of huge iron ore deposits in Northern Quebec and Labrador. New hydro-electric power capacity is being developed with all speed, in an effort to keep pace with the growing demand. In Western Canada, one of the world's major oil fields is being opened up. All this calls for new transportation in the form of railroads, highways, air services and pipe lines."

Various Development Projects Cited

Mention was made by the Minister of the expansion program being undertaken by the Hydro-Electric Power Commission of Ontario, amounting to £100 millions and involving the construction of dams, the installation of turbines and generators, the erection of transmission lines, the creation of distribution facilities and establishment of steam-generating capacity. This project required quantities of heavy earth-moving equipment, transport, power compressors, drills, explosives and camp equipment. Similar developments were under way in British Columbia, the Prairie Provinces and Quebec.

Other projects under consideration were a subway system in Toronto, to be followed in due time by one in Montreal. The development of Labrador's iron ore resources involved the construction of railway lines, and the development of harbour facilities. The establishment of another large aluminum plant, in British Columbia, involved an expenditure of £75 millions, and there was renewed interest in the St. Lawrence Deep Waterway.

Private investment in the expansion and modernization of manufacturing industries during 1948 amounted to some £150 millions, providing for the production of many items, ranging from dog food to diesel-electric locomotives. The list included canneries, sugar refineries, paint works, foundries, smelters, steel plants and others manufacturing cellophane, sulphuric acid, fibre glass, soap and industrial chemicals.

British Industry Has Not Explored Canadian Market

Members of a British engineering mission seemed well satisfied with the potential for a large and lasting market for such products, the Minister declared. "Entry to the Canadian market can be had only by competition with United States industry. No one will suggest that British industry is reluctant to meet competition, but it has never really entered our market, probably because of its pre-occupation elsewhere. Time and distance, which have been handicaps in the past, have shrunk to relatively small importance, now that air freight and high-speed travel can minimize time and distance. To enter a new market is always more difficult and more expensive than to maintain a position already established, but I hope some of your exporters are already convinced that real rewards are there for those willing to make the effort. We have encouraging reports of the initiative with which some British firms are meeting the handicaps of time and distance. One firm, on learning that Canadian railways guaranteed delivery in a maximum of three weeks, organized distribution in Canada from warehouse stocks in Great Britain, with a time lapse of only seventeen days to three weeks. With sales engineers active in Canada, and by airmailing specifications and cabling orders, this firm has made itself closely competitive.

Canada One of World's Largest Import Markets

Canada provided one of the largest import markets in the world, the Minister declared in an address last Monday in London, and offered an unparalleled opportunity for absorbing exports from the United Kingdom. In volume, it is exceeded only by Great Britain and the United States as an importing nation. The value of Canada's imports was about four times that of prewar years, while the volume of her imports has more than doubled. The British Government had set a target for British exports of 150 per cent of the 1938 volume. Mr. Howe pointed out that British exporters had only to recapture their prewar share of Canadian imports to bring their shipments to Canada up to 200 per cent of the 1938 volume.

British exports consisted largely of manufactured goods, he said. Canada was among the principal importers of manufactured goods. Her imports of capital goods and production equipment would continue to increase. Canada imported machinery and replacement parts valued at £109 millions from the United States in 1948, but only £7 millions worth from the United Kingdom. "Here is a fruitful field in which we would welcome greater activity on your part", he said. "Here is a large market wide open to British exporters".

Imports from Sterling Area Relatively Small

Traditionally, Canada has shipped more goods to the United Kingdom than she has received from that country. "Considering the nature of our exports, as compared with yours, it is unlikely that a balance can ever be struck," Mr. Howe declared. "Not that we seek a bilateral balance as such, but, in endeavouring to reduce the gap, it seems to us that we must both think of our mutual trade, as between the United Kingdom, your colonial empire and other Commonwealth countries on the one hand, and the Western Hemisphere on the other.

"Between 1935 and 1939, Canada drew from the sterling area, including the United Kingdom, some 29 per cent of our total import requirements. This figure had dropped to 14 per cent in 1947, and rose in 1948 to 19 per cent. The overall improvement that I have mentioned came about through an increase of 4 per cent in goods from the United Kingdom, and only an increase of one per cent from the rest of the sterling area. In other words, the increase in the volume of goods we received from the sterling area, outside the United Kingdom, was disappointingly small.

"Our problem is to narrow the gap of some £75 millions in our trade with the sterling area; a gap that is today covered by the temporary expedient of special grants and loans. As the great bulk of the world's trade is still in primary foodstuffs and raw materials, and as this class of goods represents the major part of our exports to you, I think you will agree that it is unrealistic to hope that you can make up the difference by the expansion of your sales to us of manufactured goods alone. The Canadian market holds no less a potential for primary materials from your colonial areas than for manufactured products from the United Kingdom itself. I suggest that it can only be by an expansion of such trade with the Western Hemisphere that there can be any real hope of the sterling area being able to balance its accounts with the dollar area, except by continuing a policy of restriction.

Trade with Colonial Areas Encouraged

"I hope that this same drive for exports to Canada and the dollar area from colonial and other Commonwealth areas will be made comparable with the drive for exports of the United Kingdom itself. I realize that supply shortages and divergent price levels are obstacles in this field, but should the Canadian market be left to other suppliers until the period of shortages has passed, present opportunities may be lost for all time."

The Minister pointed out that the two major trading areas, the dollar area on one hand, and the sterling and other currency areas on the other, tended to develop such a serious difference in their price levels as to make the eventual return of normal competitive trade between them very remote. There was apparent in every civilized country an effort to work out some modification of the free price system, by which peaks and valleys might be ironed out; some plan by which a high level of employment might be

maintained, coupled with a measure of stability to the primary producer. This objective is a development in the process of democracy in an increasingly complex world, and as such has much to commend it. However, great care must be taken in the use of whatever device was employed, be it bulk contract, floor price programs, pool arrangements, protection from outside competition by direct licence, or otherwise, to ensure that no undue influence be placed on prices that might prejudice established and sound international trading relationships.

Creation of Non-dollar Blocs Undesirable

There was an inevitable tendency for countries that could not presently permit unlimited imports from dollar areas to trade among themselves, thereby building up a high cost area with which others could trade only with difficulty. There were situations in which goods had to be supplied without much regard to what was received in exchange, Mr. Howe declared. Under such circumstances, anything received in payment was of value, irrespective of the apparent price. There was a danger, however, that such justifiable cases might set a pattern of international trade by which little or no consideration was given to the matter of cost, or economic efficiency.

"These are trying times for those concerned with international trade," the Minister said in conclusion. "From week to week, and from month to month, hard decisions must be made, decisions that test the patience and the ability of everyone dealing with them. Fortunately, we who are gathered here have an association that is based only in part on economic relationships. The ties of family, of common traditions and shared culture form a bond too profound, too vital to be disrupted by irritations arising out of our day-to day commercial relations. Let us strive to keep irritations to the minimum by preserving flexibility in adjustment to the changing conditions imposed by the realignment of world trading relationships. Let us keep alive that spirit of give and take that has stood us in good stead in the past. If we can do that, we can hope to find a happy solution for our problems, and thus strengthen, not weaken, the bonds of our association within the British Commonwealth of Nations."

Canadian Goods Shipped Under ERP

Actual European Recovery Plan shipments from Canada of coarse grains, dairy products and bread grains amounted to 98, 94 and 92 per cent respectively of the authorizations approved by the Economic Co-operation Administration, as of February 28, 1949.

Other shipments:

Lumber and manufactures	86 per cent
Fats and oils	84 per cent
Meat	82 per cent
Pulp and paper	73 per cent
Oilcake and meal	67 per cent
Chemicals and products	65 per cent
Non-ferrous metals	62 per cent
Non-metallic minerals	57 per cest
Fertilizer	56 per cent
Machinery and vehicles	48 per cent
Hides, skins and leathers	31 per cent
Miscellaneous agricultural products	20 per cent
Metallic ores and concentrates	7 per cent
Miscellaneous articles	10 per cent

Portugal's Trade Position Better Though Balance Unfavourable

Figures for first ten months of last year show improvement over position in same period of previous year—United Kingdom replacing the United States as chief source of supply—Imports from Canada reduced, owing to smaller purchases of wheat and potatoes.

By L. S. Glass, Canadian Government Trade Commissioner

LISBON, March 14, 1949.—Portugal had an unfavourable trade balance for the first ten months of 1948, exports being valued at the equivalent of $141,000,000, as compared with imports during the same period of $317,000,000. The difference of $176,000,000 was less than the unfavourable balance in the corresponding period of 1947, amounting to approximately $200,000,000.

Portuguese Imports, by Principal Commodities

	Jan.-Oct., 1948	
	$ Million	Per Cent
Total imports	220.0	100.0
Raw materials	128.0	40.0
Foodstuffs	61.2	19.4
Farinaceous products	38.9	12.3
Machinery, vehicles and ships	89.0	28.0
Manufactures	30.2	9.5

Portuguese Imports, by Principal Countries

	Jan.-Oct., 1947		Jan.-Oct., 1948	
	$ Million	Per Cent	$ Million	Per Cent
Total imports	220.0	100.0	317.0	100.0
United States	77.6	32.6	72.7	22.9
United Kingdom	29.8	12.5	68.8	21.7
Belgium	12.7	5.4	27.0	8.5

Imports from Canada Reduced

Imports from Canada decreased in value from $3,240,000, or 1·4 per cent of the total, to $2,060,000, or 0·7 per cent. This reduction was due largely to the fact that purchases of wheat and potatoes from the Dominion, which in 1947 were respectively 7,342 tons and 7,849 tons, were not repeated in 1948, Argentina and the United States having become the foremost suppliers of wheat and Denmark of potatoes. Potatoes for table consumption were not imported to any extent in 1948, and such imports as were permitted, together with those of seed potatoes, were from soft-currency countries only. Imports from Argentina increased from a value of $10,900,000, or 4·6 per cent of the total imports, to $20,400,000, or 6·5 per cent, largely due to the increased purchases of wheat, from 11,000 tons in 1947 to 76,000 tons in 1948.

The value of exports from Portugal showed a slight increase, from $130,000,000 in 1947 to $141,000,000 in 1948. However, the greater part of this increase was accounted for by the larger shipments to Portuguese colonies, which increased from 23·8 per cent of the total exports to 26·9 per cent. Exports to the United States increased slightly, from $14,800,000 to $15,080,000, but those to the United Kingdom increased from $22,000,000 to $27,000,000.

Exports to Canada, on the other hand, were reduced from $1,400,000 to $1,300,000. For the first time since the war, Germany appears in

Portuguese statistics. Imports into Portugal from that source in 1948 were valued at $1,360,000, while exports thereto had a value of $2,400,000.

Dollar Reserves being Depleted

The continued unfavourable trade balance with hard-currency countries is fast depleting Portugal's dollar reserves. Out of these reserves had to be paid to the United States alone some $17,600,000 during the first ten months of 1948. It is estimated that the total foreign exchange reserves of Portugal, not including gold backing for note issue, are between $100 million and $110 million, a sum hardly sufficient to meet the anticipated capital expenditure of the near future for transportation and industrial development. It is highly probable, therefore, that Portugal will obtain some assistance under the European Recovery Program. At the same time, it is probable that such monetary assistance as may be received will be specifically earmarked for development of internal transportation, hydraulic electric power development and also the possible development of hematite deposits in the northern part of the country and of coal deposits in the southern area.

Economic Conditions Practically Unchanged

During the last four months of 1948, there was in general little, if any, change in economic and commercial conditions in Portugal. Dollar exchange continued short, and conservation had to be most rigorously maintained while the outflow of dollar exchange was at a high level and its use was confined to capital goods essential to industrial requirements and certain highly necessary consumer goods not available from soft-currency sources. The political situation was a somewhat disturbing factor towards the end of the year, with the presidential election impending in February, 1949.

For the twenty-first successive time, the Minister of Finance has brought down a balanced budget, indicating a nominal surplus of $40,000 for 1949. The total amount budgeted, both as regards receipts and expenditures, shows but a slight increase over the 1948 figures, when receipts were estimated at $222,000,000 and expenditures at $221,600,000; income in 1949 is estimated at $226,692,000 and expenditure at $226,656,000.

Expenditures for ordinary account for each ministry are slightly higher than in 1948, with the exception of Finance (public debt) and Public Works. Extraordinary expenses, on the other hand, are all reduced, except funds for the encouragement of agricultural and industrial developments in the country through direct financial aid. In this respect an additional $660,000 is provided, bringing the total to $3,600,000. Wartime and defence allocations are again reduced, in so far as extraordinary expenses are concerned, from $18,400,000 in 1948 to $12,240,000 in 1949. The Ministry of War, under ordinary expenses, is allotted increased expenditure of $1,980,000.

As at the end of November, 1948, total receipts were $184,000,000, leaving a balance uncollected of $37,510,000, roughly six weeks' collections for the final month of the year. At the same time, expenditures already made by the various government agencies totalled $193,626,000, well within the budgeted figure.

Agricultural Conditions Unfavourable

Although Portugal is becoming more industrialized, agriculture is still a dominant factor in the economy of the country. For the period January-October, 1948, the agricultural items of export comprised: unmanufactured cork, $14,800,000; resin and turpentine, $10,000,000; manufactured cork, $11,560,000; wine and brandy, $16,000,000. Apart from its importance as

Portugal—Office of the Canadian Government Trade Commissioner in Lisbon. Portuguese imports from and exports to Canada declined in the first ten months of 1948.

a source of foreign exchange derived from exports, agriculture provides a livelihood for a great part of the population and is the source of food for all. The official estimates of the crops, as at the end of October, were depressing.

Portugal suffered severe drought during 1933, 1934 and 1935; when complete crop returns are available, it is probable that 1948 will be recorded as another poor year. The production of olive groves, while not as low as in 1945, is estimated at 23 per cent below that of last year. The potato crop is expected to yield approximately 9,600,000 quintals, which is some 700,000 quintals less than in 1947, when about 55,000 tons had to be imported to meet the requirements of the country.

Before the end of 1948 there was a shortage of potatoes throughout the country, despite the fact that from January to October 4,500 tons had been imported. The corn crop is estimated at 4,538,000 hectolitres, which will be some 200,000 hectolitres below the 1947 production. It is estimated that 531,000 hectolitres of beans will be harvested, a decrease of approximately 20 per cent as compared with the figure for last year but still above the ten-year average. The rice crop is expected to yield about 854,000 quintals, or roughly the equivalent of last year's harvest, which was well above the ten-year average. Wine production is estimated at 7,195,000 hectolitres, a decrease of some 29 per cent from last year and 14 per cent below the ten-year average.

At the beginning of the new year the crop outlook was, if anything, poorer, and even by the end of February, by which time ample rain should have fallen, there had only been infrequent and insufficient showers which ran off the surface and did not filter into the soil. As a result, the fields and hillsides, which should be green with luscious growth, are almost as brown and burnt as they would be long after the rains have ceased. If conditions continue, the outlook in Portugal for essential food in 1949 is poor indeed.

32362—2

South African Farm Production Set Several Records Last Year

Favourable weather mainly responsible for high yield—Good prices received for produce by farm communities, and high level of prosperity maintained—Further progress made with soil conservation program begun in 1946.

By S. G. Tregaskes, Acting Commercial Secretary for Canada

(Editor's Note—This is the second in a series of articles on economic conditions in South Africa during 1948, prepared for *Foreign Trade*. One pound equals $4.03 Canadian.)

CAPE TOWN, March 10, 1949.—Agricultural production in South Africa achieved several records during the past year, due largely to the favourable weather conditions that prevailed. Farming communities received good prices for their produce, and a high level of prosperity was generally maintained. Further progress was made with the soil conservation program that was initiated in 1946. Despite shortages of fertilizer, farm machinery and labour, the output of cereals was particularly high. Wheat, Kaffir corn and bean crops were good, and peak production figures were reached for maize, dairy products, meat, eggs and oil seeds.

Maize harvested in 1947-48 totalled 105,265,000 bushels, compared with 83,000,000 bushels in 1946-47, and with 62,000,000 bushels in 1945-46. As the annual requirements of this country amount to around 75,000,000 bushels, there were more than 30,000,000 bushels released for export during the past year.

Recent estimates of the 1948 season place wheat production at 17,540,000 bushels, compared with 16,775,000 bushels in the 1947 season and 9,300,000 bushels in that of 1946. However, South Africa's minimum annual needs continue to be approximately 21,500,000 bushels per year, and despite continued bumper wheat crops, it will be necessary for the Union to import between 4,000,000 and 5,000,000 bushels of wheat annually to make up the deficit. On November 1, 1948, for the first time in eight years, South Africa enjoyed white bread, a welcome change after a prolonged diet of the "standard" bread made from flour of 90 per cent wheat extraction.

Other Agricultural and Pastoral Crops Satisfactory

Both citrus and deciduous fruit production and export in 1948 showed improvement. Citrus exports totalled 3,453,344 cases, as compared with 3,319,636 the previous year. Of the 1948 export, 3,072,025 were sent to the United Kingdom, an increase of about 60,000 cases over 1947. Other markets during the year included Ireland, 100,000 cases; Sweden, 69,455 cases; Belgium and Switzerland, 150,508 cases and "Other Countries", 61,356 cases. In 1947, no shipments of citrus fruits were made to Ireland, but shipments to other markets during that year were somewhat higher.

The 1947-48 deciduous fruit crop totalled 71,865 tons as compared with 69,095 tons the previous season. Exports, however, in 1948 of 30,733 tons were considerably higher than the 16,918 tons shipped during the 1947-48 season.

Other crops for which figures are available and for which the 1948 season was satisfactory include Kaffir corn, 2,032,000 bags in 1948, and 895,000 bags in 1947; potatoes, 3,870,000 bags in 1948 and 3,826,000 bags

South Africa—Constantia Vale and typical farming country in Cape Province. Agricultural production achieved new records in 1948, due largely to favourable weather conditions.
Courtesy Cape Peninsula Publicity Association.

in 1947: sugar, 600,000 tons in 1948 (preliminary estimate) and 512,005 tons in 1947: wool clip, 210 million pounds in 1948-49 (preliminary estimate) and 203 million pounds in 1947-48.

While agricultural production attained the above-mentioned high levels in 1948, the outlook for 1949 is not as encouraging. Severe drought conditions prevailed throughout most of the Union during the last months of 1948 and in January, 1949, and prospects for summer crops, especially cereals, are unfavourable.

Industrial Expansion Continued During Past Year

Industrial expansion continued in the Union during 1948, when 4,360 new companies were registered, compared with the previous record of 3,721 of 1947. It is interesting to note, however, that the capital of new firms totalled £78,000,000 in 1948 as compared with a 1947 figure of £98,300,000, indicating an increasing scarcity of capital funds in the Union, and possibly a slowing down in the tempo of industrial expansion which has characterized Union industry during the last ten years.

The 1948 output of steel in the Union of around 600,000 tons was not sufficient to meet a demand roughly estimated at over one million tons. The completion of a new plant by 1950, now in the course of erection, plus expansion of that now in existence, will raise South Africa's raw steel output to 950,000 tons per annum. The metal engineering industry was more active during 1948, but shortage of steel was still a limiting factor. Wherever possible, manufacturers of metalware are using aluminum instead of iron and steel.

Secondary industries continued at a high level of activity during the last six months of 1948. Estimated footwear production in the Union during 1948 exceeded the level attained in 1947 by 35 per cent. Clothing

32362—2½

manufacturers worked at near capacity level throughout the year, but increasingly competitive conditions were apparent. Furniture manufacturers continued in full production but, during the latter part of 1948, quiet retail conditions and increased instalment sales were unfavourable factors. Confectioners reported an increased demand for their products during the latter part of 1948.

Benefits to Local Industry are Possible

While the impact of import controls on all phases of the Union's industry cannot be forecast, nevertheless secondary industries should benefit from the reduced competition of imported articles, provided that the exchange of their raw material requirements is forthcoming and adequate labour and capital are available. In many cases total demand will be directed towards the products of local industries whose continued development and expansion can be expected as long as import controls remain in force, although official warnings have emphasized that South African firms should not dissipate their resources in the manufacture of poor-quality merchandise, nor in the production of articles which will not be able to withstand competition from abroad when import or exchange controls are used.

While the labour position remained difficult, the supply position for cement, timber and brick eased somewhat in the last six months of 1948. The value of building permits issued during 1948 exceeded £44,000,000 to which should be added some £12,000,000 for provisional permits and an estimated £50,000,000 for non-controlled housing projects. The year's total building program, therefore, was valued at approximately £100,000,000 compared with £70,000,000 in 1947. Adequate housing facilities for both Europeans and non-Europeans continued to be a most pressing problem, and it is not anticipated that supply will equal demand for many years.

South African Fisheries Made Satisfactory Progress

Satisfactory progress was made in the fishing industry of the Union during 1948 and fish canneries and fish oil reduction plants were generally active throughout the year. Several new factories came into operation and extensions were completed to existing plants.

The quasi-government Fisheries Development Corporation of South Africa Limited continued to give active support and encouragement to every phase of the fishing industry. Extensions and improvements to three fishing harbours were begun during the year. The corporation has undertaken a program of education and training for fishermen and has continued to assist the industry in the provision of low-cost living quarters for fishermen in certain areas, and in the financing of fishing boats and equipment for fishermen. In conjunction with a private enterprise the corporation has established a company to commence oyster culture on a small scale.

The establishment of a new company in late 1948, the Tuna Corporation of Africa Limited, indicates that the South African fishing industry may expand in the direction of tuna fishing, a field exploited heretofore almost entirely by Japan and the United States. Investigations have shown that tuna normally run within a few hundred miles of the western coast of South Africa. A concentrated vitamin fish oil plant, located near Cape Town, commenced operations during 1948 and is expected to market products to the value of £1,550,000 annually. The coastal whaling season for the Union's only whaling station ended on October 17, 1948. More than 1,500 tons of oil were produced, in addition to quantities of meat-meal.

Statistics are not available covering South Africa's growing fishing trade, but overseas demand continues to increase. The United Kingdom

South Africa—Pouring molten gold at a mine on the Rand. While gold production increased in 1948, it is apparent that the unfavourable cost and labour conditions still exist.

has shown interest in the canned pilchard and mackerel pack and continued to import snoek during 1948. Markets were developed during the year in the Gold Coast and Nigeria for canned pilchards. As all imported fish products, except sardines, were banned in early November, domestic canners will have almost the entire market to themselves until the exchange situation improves.

Gold Mining Conditions are Unfavourable

While gold production in 1948 increased over that in 1947, the results were disappointing. It is apparent that the unfavourable cost and labour conditions which have caused a gradual decline in gold production in the last eight years still exist. Production for the year totalled 11,574,871 ounces, compared with 11,197,638 ounces in 1947, 11,917,914 ounces in 1946 and 14,386,361 ounces in 1941, the peak year of gold production in the Union. While production in 1946 and 1947 was interrupted by strikes, there was no cessation of work caused by labour difficulties in 1948.

Working costs per ton milled have risen steadily since 1945 from 23s. 9d. in that year to 26s. 2d. in 1948. Continued difficulties are experienced by the gold mining industry in securing adequate labour, both native and European. The number of natives employed on the Witwatersrand declined from 273,902 in December, 1947, to 254,964 in December, 1948, and it is estimated that the gold mines are short some 75,000 native workers. Similarly, the number of Europeans employed has shown a continual decline during the past three years from a monthly average of 41,690 for 1946 to 39,396 in October, 1948.

Additional labour forces are required for development work in the new gold fields of the Orange Free State. In October, 1948, 1,038 Europeans

were engaged in development work in this area and the industry is endeavouring to recruit additional labour in Ireland and the United Kingdom. No production is expected from the new development for several years.

Sales of diamonds during 1948 amounted to £38,059,000, the highest yearly total achieved. This figure compares with totals for 1947 and 1946 as follows:

Diamond Sales in South Africa

	1948	1947	1946
Sales of gem stones	£26,742,000	£20,101,000	£26,148,000
Sales of industrial stones	11,317,000	4,377,000	3,462,000
Total sales	£38,059,000	£24,478,000	£29,610,000

The abnormal increase in the sale of industrial stones during the year is attributed to large purchases made by the United States for stockpiling purposes. Development work on the reopening of the former Premier mine continued during the year.

Production of coal in the Union set a new record and exceeded 1947 production by 550,000 tons. Total sales during the last three years were as follows—1948, 25,968,351; 1947, 25,414,809; 1946, 25,634,427 tons.

Exports, however, due to the shortage of freight cars and port congestion, fell short of requirements and exports were only 733,000 tons, including bunker coal, as compared with 1,500,000 tons in 1947.

Output of Other Mines Maintained

Complete 1948 production figures covering other minerals are not available, but the following table for the nine months period ending September, 1948, as compared with the same period in 1947 and 1946, will give an indication of the trend:

Production of Other Minerals

	Jan.-Sept., 1948	Jan.-Sept., 1947	Jan.-Sept., 1946
	Figures in Short Tons		
Asbestos	32,230	20,918	14,445
Chrome	362,917	299,656	164,966
Copper, ore and concentrates	28,313	25,127	21,758
Iron ore	945,151	962,597	721,409
Manganese	221,484	228,658	188,135
	Figures in Ounces		
Platinum	50,732	53,919	57,091

As the railway car situation improves, due to the decline in import traffic, increased production and export of chrome ore and other items are anticipated.

Paper to be Manufactured from Sugar-cane Waste in Mexico

Mexico City, April 7, 1949.—(FTS)—Sugar-cane waste is to be used in the manufacture of newsprint and finer papers in Mexico, where a large, new factory will be going into production shortly at Zacatepec, in the State of Morelos. The plant is located in the centre of a sugar-growing area from which bagasse, as the cane waste is known, will be drawn.

Since bagasse yields a short fibre, added strength will be obtained from the use of 20 per cent of bamboo pulp, which has long fibres.

Production costs are estimated at 300 pesos per metric ton. The product will be heavier than newsprint and it is expected to be put on the market as a fine paper, useful for newspaper publishing only as an alternative.

Burma is Importing Petroleum Due to Unsettled Conditions

Rehabilitation of industry, including reconstruction of refineries and pipelines, delayed by insurrection—Efforts made to restore rail and river transportation facilities—Production of silver-lead mines improving—Tin and wolfram mining operations also affected by state of tension.

By C. R. Gallow, Commercial Secretary for Canada in Bombay

(Editor's Note—This is the second in a series of three articles on economic conditions in Burma during the past year, prepared for *Foreign Trade*.)

BOMBAY, March 4, 1949.—Burma, which is normally a substantial producer of petroleum, was largely dependent last year on other countries for necessary supplies. This was due in large measure to the unsettled condition of Burma, which rendered difficult the reconstruction of her oilfields, pipelines and refineries. Deliveries of fabricated steel and other manufactures required by the industry have been delayed, thereby preventing completion of plans for its rehabilitation.

Although progress has been made at the oilfields and the Syriam refinery, connections with Rangoon were virtually cut off during the second half of the year, except by air. None of the heavy material needed for reconstruction could be delivered, and work on the pipeline was completely disrupted by insurgents. At Syriam, progress was halted by the insurgents for six weeks in July and August, before the area was cleared by government forces.

Upwards of £8,000,000 was expended by the oil companies on reconstruction, in the expectation that they would receive compensation for enormous losses sustained during the war, and in the hope that favourable conditions would develop in Burma. When work was interrupted by the insurrection, particularly on the pipeline, the companies were unable to find further financing under existing conditions. They were requested by the government to consider terms under which an undertaking of such great importance to the country might be continued with government assistance. Pending the completion of negotiations, work has been continued.

Transportation Facilities Presently Inadequate

Burma is now receiving her full requirements. However, imports are of little use if they cannot be distributed throughout the country. It is believed that rail and river transportation facilities will soon be restored, and hoped they will be adequately maintained. Meanwhile, the oil companies are trying to keep supplies moving, and have met with much success. In some outlying districts, the villagers have been short of kerosene.

The production of petrol, kerosene and fuel oils by the primitive refining methods available at the oilfields was increased during the past year. Further expansion is limited by the capacity of the available routes that remain open for distribution of these petroleum products.

Smelting and refining operations commenced at the Bawdwin silver-lead mine, in the Northern Shan States, during the middle of last May, when three diesel engines were installed. Production to the end of last year amounted to 7,450 tons of refined lead and 450,000 ounces of refined silver. In addition, 1,500 tons of zinc concentrates were shipped and some 500

tons of copper matte were produced. This output was procured from unfinished products available before the evacuation of Burma, and not from newly mined ore. A small amount of new ore from the mine was processed, but mining operations were interrupted by heavy damage to the surface installations, the works and railway by unprecedented floods in the early part of October. The worst effects of these were overcome by the end of December.

Smelter operations were curtailed by interruptions to the railway from Rangoon. Until the Gokteik viaduct has been restored, the capacity of the Burma railways beyond that point will be restricted. Procurement of adequate tonnages of coke suitable for smelting is doubtful, supplies being scarce. Production is dependent directly on the amount available.

Satisfactory sales of products have been made but, to a large extent, the high prices received have been offset by substantial increases in costs. It remains to be seen if prices will remain at a level that will cover the steep rise in these costs. An example of the uneconomic results of the present limited scale of operations is that, for about one-sixth of pre-evacuation production, it is necessary to employ more than one-third of the former number of workers. Every means is being used to increase all-round efficiency as the best way to offset, as far as possible, the serious effects of the great increase in costs of rehabilitation and production.

Resumption of Metal Exports Aids Foreign Exchange Position

Resumption of exports of pig lead, silver and zinc concentrates has considerably benefited Burma's foreign exchange resources. Continuation of operations on an increasing scale would be an important economic advantage, not only to Namtu and the surrounding localities, but also to Burma as a whole. The operations of this mine result in the distribution of large sums of money, not only to and by the employees but also by the considerable payments for customs and other duties, port charges, large purchases of stores and the substantial tonnage of freight to the Burma railways.

The lease of the Bawdwin mine expires at the end of 1949 and the company, having declared its option for renewal, awaits the government's response.

Certain areas producing lead ore are being operated by local producers, owing to the high price of lead. Little progress was made in the rehabilitation of the tin and wolfram mines in the Tenasserim division during 1948, due, in part, to the failure on the part of the government to formulate future policy concerning the mining industry. The threat of nationalization deterred a number of companies from spending large sums of money on capital equipment. Even the modest program of rehabilitation was seriously impeded by the delay in the issue of import licences for vital plant and equipment. The non-renewal of certain mining leases has had a depressing effect on the industry as a whole.

Labour Force Affected by Insurgent Activities

Insurgent activities during the latter half of the year in both Mergui and Tavoy districts kept labour forces in a state of tension for long periods. It resulted in the occasional production stoppage at some of the smaller mines and caused a considerable fall in production from several of the larger mines.

Despite good prices for tin and wolfram, the year was a bleak one for the local mining industry. The price of metallic tin still is controlled by the United Kingdom Ministry of Supply, and, on January 1, 1948, was increased from £500 to £504 per ton. On June 1, the price was

increased to £554 per ton and is guaranteed until June 30, 1949. Wolfram opened the year at about 130 shillings per unit WO_3 and remained steady for the first six months, after which it dropped to just under 100 shillings per unit towards the end of September, but rallied and closed at about 110 to 115 shillings per unit at the end of the year.

The tin and wolfram treatment plant having been restored, production at the Mawchi mines was recommenced in the early part of the year. Although the plant is capable of a considerable output, mining operations were restricted by shortage of labour, as the entry of further labour from India for work underground was not permitted. Despite the limited labour force, however, good progress was made and as the available labour became more experienced, production was mounting month by month until, as a consequence of the political unrest in Karenni, the Government of Burma placed an embargo on explosives entering the Mawchi area. As explosives are essential for underground operations, it was necessary to reduce operations, labour and staff accordingly.

Owing to the continued unrest in Burma, especially in the Yamethin area, there are a number of small mines which have still not recommenced operations.

The cement works at Thayetmyo were severely damaged as a result of the war. Reconstruction started early in 1946 and it was hoped that the works would be producing cement by the middle of 1948. These hopes were not realized, however, due to the delay in shipment of new material from the United Kingdom, and the deterioration of law and order at Thayetmyo, which compelled personnel to be evacuated on two occasions.

A start has been made at making clinker at the works and it is hoped that cement will be available for the Burma market shortly. The industry then should quickly assume its prewar role of making Burma self-supporting in respect of cement.

Production of Matches Curtailed

Before the second world war there were four match factories in Burma at Kanaung, near Rangoon, Mandalay, Rangoon and Kemmendine. During the Japanese occupation, the match factory at Kanaung was so badly damaged that the management decided not to reopen it. The factory at Mandalay was damaged by fire in March, 1942, and there was also a certain amount of looting during and after the Japanese occupation. It has, however, been repaired and extended, present production exceeding the prewar output. The match factory in Rangoon escaped from the war practically undamaged and was able to resume manufacture at an early stage. The factory at Kemmendine was not damaged during the war, but it has not resumed operations. A cottage industry for the manufacture of matches has been started on a small scale at Kyaikzagaw, near Pegu.

Before the Japanese occupation, the yearly match consumption in Burma was about 54,000 cases of 50 gross each. During the year 1948, the total match consumption has dropped to about 28,000 cases. Reduced consumption is due mainly to the extensive use of mechanical lighters, on which no excise is levied by the government at present. Surplus army stocks and smuggling of matches, from Siam in particular, are other reasons for the reduced consumption of matches.

While certain difficulties have been experienced in obtaining import licences for the necessary raw materials, it so far has been impossible to keep the match factories operating without any serious interruption.

During the year, the Electricity Supply Act was passed, which provided for an Electricity Supply Board for the whole of Burma with powers to acquire and operate any electricity supply undertaking on giving three

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months' notice. The terms of compensation laid down in the Act are based on first cost less depreciation or market value, whichever is less. Thus, whether prices for machinery and plant go up or down the government has ensured that the basis for valuation shall be favourable to itself as buyer, irrespective of actual replacement costs.

In Rangoon, the shortage of available power continues, with no hope of amelioration until late this year, as the generating plant ordered three years ago has not been delivered. The number of consumers in Rangoon has risen during the year from over 4,000 to nearly 9,000, but there are still several thousands awaiting service. This load increase has placed a great strain on the generating plant at the Ahlone power station.

A Hydro-Electric Survey Board was set up during the year under the Hydro-Electric Survey Order, 1947. Unsettled conditions up-country, however, have made the work of survey difficult.

Reconstruction Plans in Venezuela Retarded by Shortage of Labour

Workers from land, sea and factory absorbed by oil companies—Number of immigrants below population requirements—Labour organizations have developed rapidly, 950 unions having a membership of 110,000.

By J. A. Stiles, Assistant Canadian Government Trade Commissioner

(Editor's Note—This is the last in a series of articles on economic conditions in Venezuela, prepared for *Foreign Trade*. One bolivar equals $0.2985 Canadian.)

CARACAS, January 26, 1949.—Relatively little unemployment exists in Venezuela, since labour is perhaps the only scarce commodity in the present economic boom. The manpower shortage became acute when the oil companies began to absorb labour from the land, sea and factory, and this situation constituted a great handicap to the country's reconstruction plans. Government efforts to encourage immigration secured only 15,000 selected immigrants in 1947, together with an additional 20,000 who paid their own way, and this year's objective of 26,000, unlikely to be reached, is still far below population requirements. Of 4,623 applicants, the National Labour Exchange, at present working in Caracas only, obtained employment for 1,406, and granted 51 loans for the development of small domestic industries.

Labour claims were greater in 1947 than in previous years, owing to the more rapid development of industry and labour organizations. There were 575 collective bargains signed in 1947, and the authorities dealt with 203 labour claims, 55 of which resulted in strikes. Only 15 of these were declared illegal.

There were 184 new unions founded in 1947, with a membership of 10,067. This raises the total number to 950 unions, with 109,592 members. Of this number, 433 are land-workers' unions, with 36,194 members. There are 16 employers' organizations.

To illustrate the growth of organized labour in the country, 252 unions were in operation in 1945, with a membership of 48,789; in 1946, the number was 773, with 99,525 members, and in 1947, 950 unions had a membership of 109,592.

Substantial Gains Made by Workers

Negotiations between the oil companies and workers were concluded in February, 1948. The workers were represented by a Federation, led by Acción Democrática, and the government took an active part in the negotiations. Under the contract the workers have obtained substantial gains, most important of which are an increase in the basic wage of Bs.2.00 a day, with a recognized minimum of Bs.14.00 a day, and an increase of 16⅔ per cent for workers on the monthly payroll. Overtime rates are fixed at 50 per cent above normal rates, and 21 days' holidays with pay are granted. The contract is to be in force for three years, with the proviso that after two years the parties may discuss the wage clauses. The effect on the wage and price structure of the country is bound to be somewhat inflationary, and other workers will attempt to obtain similar benefits. This will operate to the detriment of agriculture and local industries, since they can scarcely afford their present wage level in their fight against foreign products. Movement from the land will be still further accentuated.

Prices and wages have been soaring with the expansion of the oil industry. The general wholesale price index reached an all-time high level in December, 1947, and the rising tendency has prevailed throughout 1948. Among the factors contributing to this continuing increase are the deficit production of the agricultural enterprises of the country; the trend toward urbanization; and the attraction to the petroleum industry of large numbers of the agricultural labour force.

Short Supplies Have Contributed to High Food Costs

Short supplies of basic food commodities such as corn, black beans, sugar and wheat flour, as well as the high cost of beef, have contributed to the continuing rapid increase in food costs.

Thus, though the price of imported products has risen rapidly owing to the high level of world prices and difficulties of supply resulting from shortages abroad and distribution difficulties, prices of domestically produced goods have also risen, but not as sharply, owing to short crops and the general inability of the domestic production to supply the national demand.

The following table compiled by the Banco Central for the Federal District is indicative of conditions throughout the country:

Wholesale Price Indexes (Federal District)

(1938=100)

	1942	1943	1944	1945	1946	1947	1948*
General index	115.92	128.95	134.12	135.20	137.10	155.68	174.19
Imports	157.10	167.80	158.63	161.98	158.77	176.25	191.24
Domestic products	109.36	120.48	127.17	131.02	136.33	152.42	164.13
Agricultural products, unprocessed	103.58	121.90	141.48	142.34	173.45	211.74	231.75
Raw materials and supplies for industry	101.99	113.25	106.56	101.47	91.91	94.94	102.36
Foodstuffs and beverages	108.66	121.95	133.14	133.45	143.82	172.15	198.36
Textile, hide and footwear products	127.33	149.22	160.35	178.87	203.85	234.83	250.23
Construction materials	136.87	145.26	140.34	149.58	151.74	174.08	199.34
Fuel and electricity	109.98	124.19	114.08	104.31	68.80	69.05	69.63
Machinery, apparatus and rubber products	151.05	168.85	171.90	177.36	163.68	167.92	170.50
Chemical and pharmaceutical products	144.48	153.34	142.93	135.70	132.09	145.46	159.76
Miscellaneous	114.63	118.84	116.78	118.66	124.98	132.76	149.00

* As at November, 1948.

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Czechoslovakia Creates Eighteen Additional Joint Import and Export Stock Companies

Marks second stage in establishment of new foreign trade pattern—First six groups, established last year, embraced chemicals, earthenware, textiles and clothing, oilseeds, fats and oils, glassware and hops.

By Yves Lamontagne, Commercial Counsellor for Canada in Switzerland

(Editor's Note—Details concerning the first six trading groups established in Czechoslovakia were published in the October 23, 1948, issue of *Foreign Trade*.)

BERNE, April 2, 1949.—Eighteen additional joint stock companies have been created in Czechoslovakia for the importation and exportation of certain commodities. This is the second stage in the establishment of a new foreign trade pattern, which provides for the establishment of monopolies under the control of the Ministries of Foreign Trade and Finance. The first six groups, which began operating last September, embraced chemicals, earthenware, textiles and clothing, oilseeds, fats and oils, glassware, and hops. The new trading associations, with their respective addresses and an outline of their activities, are as follows:

1. *The Czechoslovakian Woodpulp Export Company, Limited*, for the import and export of woodpulp of all kinds, as well as raw materials and machinery for processing and intermediate products. Address: Leskova 1/d., Bratislava.

2. *PAPCO*, Czechoslovak company for the import and export of paper of all kinds. This company will also handle materials and equipment required by the paper industry. Address: Trida Politickych veznu 10, Prague II.

3. *The Czechoslovak International Forwarding Company, Limited*, under the designation METRANS. This concern became, on December 1, 1948, the exclusive company in the freight forwarding field. It may purchase or charter ocean ships. Address: Na Prikopy 8, Prague II.

4. *Exico Company, Limited*, for the export and import of leather and rubber products. This company has the exclusive right to carry on foreign trade in its field, which includes raw materials as well as manufactures of all kinds. This concern took over certain products which were formerly in the hands of the Kotva Company. Address: Gott Waldov, Zlin. Branch: Bratislava.

5. *Slovak Magnesite National Works*, which will handle magnesite, burnt or calcined, as well as magnesite bricks. Address: 9 Gajova, Bratislava.

6. *Koospol*, for imports and exports of agricultural products and materials for agriculture. An independent branch deals with imports and exports of grain and fodder, with the exception of seed. Address: Perlova 1, Prague I. Branch: Bratislava.

7. *Centrokomise*, for the import and export of foodstuffs, mainly colonial products, dried fruits, alcoholic beverages, mineral waters, raw materials for the chocolate industry, chocolates, sweets and aromatic substances. Address: Na Florenci 5, Prague II.

8. *Metalimex*, for the import and export of ores, metals and allied products. An independent branch will handle lead ores, lead, tin, aluminum and antimony. It will also export Czechoslovakian iron ore. Address: Tr. Politickych veznu II, Prague II. Branch: Bratislava.

9. *Poldi Limited* will import and export high quality steels and products. This company will be under the management of United Steelworks, a national enterprise. Address: Kladno.

10. *Koh-i-noor, L and C Hardmuth*, for the import and export of school and office supplies, as well as chemicals and other auxiliary materials for the industry. Address: Oeské Budějovice, Londynska 280.

11. *Koh-i-noor*, for the import and export of small wares. This company will handle fancy-goods, haberdashery and requisites for industry and handicrafts. Address: Hybernska 24, Prague II.

12. *Ferromet Czechoslovak Company*, for the import and export of foundry products. This concern will handle all foundry products except those in the high quality steel sector. It will be managed by Czechoslovak Iron and Steel Works, a national enterprise. Address: Tr. Jana Opletala 87, Prague II.

13. *Cukrex*, sugar trading company. This firm will handle imports and exports of raw and refined sugar, molasses and sugarbeet. Address: Prague.

14. *Czechoslovak National Mines Company* is the sole exporter and importer of solid fuels and graphite, except for mixtures of graphite in powder or pressed for the manufacture of pencils. Address: Lazarska 7, Prague II.

15. *Czechoslovak Malting Limited*, which has the exclusive right to export and import malt, malt flour and malt extracts, etc., with the exception of pharmaceutical preparations. Address: Olomuc.

16. *"KOVO" Limited*, for the trade in products of the metal and machinery industries, as well as raw materials. This concern will be the most important of all the foreign trade companies in Czechoslovakia. It has the exclusive right to the import and export trade in the commodities specified, with the exception of machinery required for branches other than the metal industry. It will also be entrusted with the wholesale distribution of certain products on the domestic market. Address: Jungmannova 29, Prague II.

17. *LIGNA, Limited*, will handle imports and exports of products of the timber and wood-working industries, as well as auxiliary materials. Address: Vodickova 41, Prague II.

18. *The Czechoslovak Tobacco Monopoly* is the sole importer and exporter of tobacco, raw or manufactured. Address: Slezska 9, Prague II.

Most of the above concerns are authorized to act as trade agencies. They may represent foreign firms or may take over or establish agencies in other countries.

Other Developments in Nationalization

The reorganization of foreign trade by the establishment of specially privileged concerns under the close supervision of the state has been almost completed. The Ministry of Foreign Trade thus disposes of a powerful system for the implementation of commercial agreements between Czechoslovakia and other countries.

Omnipol, the purchasing organization of the Czechoslovakian metal-working industry, has granted to the firm Omack A.-G., in Zürich, its agency for all purchases in so far as Switzerland is concerned.

The new Czechoslovakian constitution, adopted in May, 1948, provided for the nationalization of all transport by rail, water, road and air. A bill has been drafted for the implementation of this measure. As a result, the following separate systems will be formed: the National Czechoslovak Railways, Prague; the Czechoslovak National Motor Transport, Prague; the National Czechoslovak Elbe Navigation Company, Ostrava; the National Czechoslovak Oder Navigation Company, Bratislava; the National Czechoslovak Airlines, Prague; the National Danube Reloading and Storage Company, Bratislava.

A new Czechoslovak Chamber of Commerce was inagurated on December 30, 1948, with offices at U Obecniho domu 3, Prague I. All the former chambers of commerce have been dissolved, and the national chamber will have its branches in the following towns: Plzen, Ceske, Budejovice, Pardubice, Hradec Kralové, Liberec, Teplice, Karlovy Vary, Brno, Olomuc, Ostrava and Bratislava.

All the recently formed privileged companies are members of the new central chamber, which, among other duties, will (*a*) enter into and maintain professional contacts with international economic organizations; (*b*) conduct a publicity and information service in economic matters for persons or firms located abroad, supplying data on transportation, customs duties, exchange regulations, terms of payment, etc.; (*c*) provide assistance in forming contacts between Czechoslovak and foreign firms, and (*d*) offer assistance in the settlement of disputes, issue certificates of origin, legalize consular invoices and perform similar services.

Important Labour Developments Occurred In India Last Year

Many attempts made to improve conditions of industrial worker—Year opened with capital and labour pledged to avoid strikes, industrial strife and a slowing-down of production for three-year period—Federal adherence to this policy and establishment of machinery for other measures promised.

By Richard Grew, Commercial Secretary for Canada

(Editor's Note—This is the fifth in a series of articles on economic conditions in India during 1948, prepared for *Foreign Trade*. One rupee equals 30 cents Canadian.)

NEW DELHI, February 19, 1949.—Important labour developments occurred in India during 1948, with representatives of employees, trade unions and economists meeting often in an attempt to improve the conditions of the industrial worker. The year opened with employers and employees pledged under the Industrial Truce Agreement to avoid strikes, industrial strife and a slowing down of production for a three-year period. In the statement on industrial policy made by the Prime Minister in April, the government promised to adhere to this resolution and to establish machinery for advice on fair wages, and a fair remuneration for capital and conditions of labour.

All provincial labour ministers met at Delhi in May, in the first attempt to effect this promise, to establish tripartite advisory committees, both at the Centre and in the provinces, for the purpose of implementing the Industrial Truce Resolution. The advisory committees were to deal with wages, production, industrial relations, housing and similar matters; the Central Advisory Committee was to be the pivot of the industrial truce machinery, entrusted, among other duties, with the work of examining the report of the expert committee on fair remuneration to capital appointed by the Provincial Labour Ministers' Conference. Among other decisions of the conference were the retention of employment exchanges as permanent bodies, the continuation of training centres established by the Labour Ministry, the collection of statistics and the strengthening of inspection services under the Factories Act in provinces and states.

Expert Committee on Fair Remuneration Established

The Expert Committee on Fair Remuneration of Capital was set up on May 25, 1948, and held four meetings before its report was submitted on September 23. It suggested that the profit-sharing scheme it recommended should be tried for a period of five years in six well-established industries, namely, cotton, textiles, jute, steel (main producers), cement, tires and cigarettes. This recommendation was considered at the first meeting of the Central Advisory Committee, held during the first week in November at Lucknow, but no final decision has yet been taken.

During the year, tripartite industrial committees relating to textiles, coal-mining, plantations, cement and jute were established, and these made several important decisions. The committee on textiles examined the production of cloth, the feasibility of working nine-hour shifts, the practicability of three shifts to make maximum use of existing equipment, etc. The tripartite committee on coal mining has agreed to the institution of a

compulsory provident fund for coal-miners, also a school for training in the use of machinery and has decided on the payment of bonus to colliery workers.

The industrial committee on plantations met in New Delhi on March 31, 1948. It was agreed that, pending the fixation of a fair wage by wage boards, an increased dearness allowance was to be paid according to a specified scale from May 1, 1948, and it was also decided to discontinue the employment of children under 12 years of age. Other committees have made similar recommendations.

Employees Insurance Act Inaugurated in November

The Employees State Insurance Corporation Act was passed in April, and is claimed as "the first measure of social security introduced in all Asia". It was formally inaugurated by the Governor-General in November, with the establishment of the Employees State Insurance Corporation which has been set up to administer the provisions of the Act. The Act is designed to provide security for industrial workers, manual and clerical, receiving pay of Rs.400 per month or less and will involve approximately 2,500,000 workers. Contributions on a sliding scale will be paid by both employers and employees, varying with the salary received, although those receiving less than Rs.1 per day do not contribute. The central government will contribute two-thirds and the provincial governments one-third of the cost of the administration of the Act during the first five years.

The corporation consists of 31 members representing central and provincial governments, the central legislature, employers, employees and the medical profession. From these members, a standing committee of thirteen will be selected to act in an executive capacity.

In order to administer the Act effectively, it is estimated that more than 1,200 doctors will be required. It is planned eventually to extend the benefits of the Act to agricultural workers who form a large majority of the population of the country, which will mean that many more doctors will be required.

The modification of the Factories Act to include comprehensive provisions for the safety, health, and welfare of workers (overtime work, holidays with pay, etc.), was another important step in labour legislation. A further measure was the amending of the Indian Trade Union Act to provide for the compulsory recognition of trade unions by employers under the orders of a labour court. The enforcement of the Minimum Wages Act as from March 15, 1948, was another step in the direction of ameliorating working conditions in the country. The Act establishes the procedure for fixing and revising minimum rates of wages in the occupations covered by the Act.

Commodity Prices Rose During the Year

The general trend of commodity prices throughout the year was upwards, due to the decontrol of textiles and food grains, raw material shortages, transport difficulties and other causes.

Wholesale Prices of Commodities

	Food articles	Industrial raw materials	Semi-manufactures	Manufactures	Miscellaneous	General index
			(August, 1939=100)			
January	347.7	403.9	272.9	292.9	455.7	329.2
March	347.1	397.7	285.8	324.5	448.7	340.7
May	357.6	442.3	317.9	351.0	504.2	367.2
July	390.7	449.9	338.2	370.2	537.3	399.6
September	396.6	438.1	340.2	348.1	531.1	382.3
Week ended Nov. 20..	389.7	443.1	340.6	346.0	547.6	381.3

During the first three months of the year, the prices of certain groups of articles, notably those of food, were relatively steady, but thereafter prices rose swiftly. The index number of food articles, which was about 348 in the first quarter of 1948, rose as high as 397·7 in August, but declined slightly from that date.

The Government of India held a series of talks with economists, bankers, industrialists, labour leaders and others, during the months of August and September, in an effort to stem the inflationary trend of the country's economy. Some of the measures advocated have been accepted and their application is likely to reduce the wholesale prices, which, in turn, will lower the cost-of-living figures. But the food situation of the country is so precarious, and raw material and production problems so acute, that it is difficult to foresee what the lasting effects will be.

Canadian Combines Shipped to Syria

Fifty-nine Canadian combines are being shipped to Syria, where they will be used in harvesting the wheat crop this year. A total of 11,981 machines, valued at $28,000,000, were exported from Canada in 1948 to many different countries.

United Kingdom Industry Department Head Appointed

London, April 29, 1949.—Sir Graham Cunningham, Chairman of the Triplex Safety Glass Company, Limited, and member of the Economic Planning Board, on April 26, was appointed head of the department representing United Kingdom industry which will work with the United Kingdom Board of Trade in its efforts to increase exports to Canada and the United States. The post will occupy a large part of Sir Graham's time.

The appointment was made at a meeting at the Board of Trade attended by about 80 leading representatives of United Kingdom industry, finance and trade unions. The meeting implemented the statement made by Mr. Harold Wilson in the House of Commons on April 11 during the budget debate, when he discussed the problem of the balance of trade with North America. Mr. Wilson, the President of the Board of Trade, took the chair at the meeting on April 26 and the Chancellor of the Exchequer, Sir Stafford Cripps, attended and made a statement.

After thorough discusion, it was agreed that it was a matter of extreme importance no less to Canada and the United States than to Britain that a sustained effort should be made to maximize United Kingdom exports to those countries and so enable Britain to continue her purchase of their products. Results could not be expected by merely a short-term effort and there was therefore a need for a central focus to foster and direct it.

The nomination of Sir Graham Cunningham to lead this effort was cordially and unanimously accepted and it was agreed that a committee under the chairmanship of Sir Clive Baillieu, former President of the Federation of British Industries, should be set up immediately to settle the lines on which Sir Graham Cunningham's work could most effectively be carried out.

Both spokesmen said the idea of Sir Clive Baillieu's committee was to find out how the effort of industry could best be mobilized behind the export drive. The committee would settle such questions as setting up Sir Graham Cunningham's department and how best to give industry guidance on the needs of dollar markets. Said a spokesman "The committee is to start work in the next few days and we hope to get reports from it very quickly".

Canadian Exports, by Areas

Geographic Areas	March			January—March		
	1938	1948	1949	1938	1948	1949
Commonwealth Countries	(Millions of Dollars)					
United Kingdom and Europe	28.3	59.9	41.3	90.3	178.0	141.6
America	1.8	8.7	7.0	5.0	25.7	20.0
Africa	2.1	5.5	6.3	5.2	14.7	14.6
Asia	1.2	2.0	8.3	2.8	8.5	31.1
Oceania	5.0	3.7	2.7	12.8	11.3	9.5
Total Commonwealth Countries	38.4	79.8	65.8	116.0	238.1	216.8
Foreign Countreis						
United States and Possessions	22.9	113.0	123.6	59.9	313.6	348.5
Latin America	1.7	8.8	9.8	4.4	26.2	26.4
Europe	6.3	19.9	9.2	13.4	72.4	43.1
Other Foreign Countries	4.1	6.9	8.4	9.5	21.7	24.0
Total Foreign Countries	35.0	148.5	151.0	87.2	433.9	442.0
Total Domestic Exports	73.3	228.4	216.8	203.2	672.0	658.8

Canadian Exports, by Countries

Country	March			January—March		
	1938	1948	1949	1938	1948	1949
Commonwealth Countries	(Thousands of Dollars)					
Europe:						
United Kingdom	27,766	59,182	39,498	88,681	175,790	139,435
Gibraltar	500	687	1,312	1,505	1,768	1,432
Ireland	.....	1	33	.....	1	160
Malta	52	59	497	153	450	535
Total Europe	28,318	59,929	41,340	90,339	178,009	141,562
America:						
Newfoundland	652	3,005	3,506	1,536	9,448	9,229
Bermuda	108	539	345	302	1,195	976
Barbados	87	433	423	246	1,278	1,282
Jamaica	350	1,524	661	1,148	4,176	1,632
Trinidad and Tobago	282	1,225	862	856	4,493	3,283
Bahamas	163	387	212	496	1,097	677
Leeward and Windward Islands		579	371		1,427	1,121
British Honduras	19	102	64	60	263	136
British Guiana	114	909	556	314	2,297	1,689
Falkland Islands	.....	.....	.....	.....	.....	5
Total America	1,775	8,703	7,000	4,958	25,674	20,030
Africa:						
Northern Rhodesia	1,775	19	53	4,319	30	102
Union of South Africa		4,393	4,896		11,738	12,017
Other British South Africa		1	3		1	3
Southern Rhodesia	161	91	129	334	379	698
Gambia	2	10	.....	4	16	.....
Gold Coast	5	214	149	12	542	475
Nigeria	6	68	823	17	205	848
Sierra Leone	18	70	38	46	421	61
Other British West Africa	.....	.....	.....	.....	.....	.....
Anglo-Egyptian Sudan	1	1	7	187	13	9
British East Africa	92	660	238	239	1,314	429
Total Africa	2,060	5,527	6,336	5,158	14,659	14,642

Note.—Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts.

Canadian Exports, by Countries—*Continued*

Country	March			January—March		
	1938	1948	1949	1938	1948	1949
COMMONWEALTH COUNTRIES—Con.	(Thousands of Dollars)					
Asia:						
India	388	581	6,495	972	4,040	23,989
Pakistan		3	255		43	3,004
Burma*	10	.....	.....	43	.....	.....
Ceylon	19	58	612	57	320	814
Aden	15	56	1	29	122	25
Malaya	385	543	401	1,041	1,566	1,525
Other British East Indies	1	.....	.....	2	.....	.....
Hong Kong	414	640	584	643	1,891	1,774
Israel†	3	129	.....	21	480	.....
TOTAL ASIA	1,235	2,010	8,348	2,808	8,462	31,131
Oceania:						
Australia	3,123	2,537	2,606	8,709	7,270	7,908
New Zealand	1,802	1,122	126	3,910	3,886	1,532
Fiji	38	7	9	117	150	38
Other Oceania	16	1	.....	27	6	.....
TOTAL OCEANIA	4,979	3,667	2,741	12,763	11,312	9,478
TOTAL COMMONWEALTH COUNTRIES	38,367	79,835	65,763	116,026	238,120	216,842
FOREIGN COUNTRIES						
United States and Possessions:						
United States	22,697	112,519	122,418	59,532	312,333	345,150
Alaska	22	24	73	30	50	234
American Virgin Islands	3	16	8	7	37	43
Hawaii	135	220	908	265	685	2,385
Puerto Rico	48	172	221	75	420	564
United States Oceania	.....	.....	16	3	112	75
TOTAL UNITED STATES AND POSSESSIONS	22,905	112,951	123,644	59,912	313,637	348,451
Latin America:						
Argentina	281	1,115	115	887	4,403	952
Bolivia	8	86	135	25	209	372
Brazil	294	1,454	2,287	832	5,163	5,432
Chile	73	268	404	183	645	893
Colombia	110	865	803	277	2,485	2,208
Costa Rica	8	109	143	27	287	495
Cuba	97	785	1,162	271	2,485	3,590
Dominican Republic	152	174	215	214	508	599
Ecuador	1	34	241	9	224	442
El Salvador	3	100	92	13	257	162
Guatemala	17	135	136	31	331	292
Haiti	11	136	214	26	425	579
Honduras	24	46	71	42	129	171
Mexico	302	1,213	1,205	738	3,461	3,041
Nicaragua	36	60	47	40	115	199
Panama	25	263	308	88	629	1,223
Paraguay	.....	4	24	3	35	37
Peru	95	204	424	262	638	1,100
Uruguay	28	241	236	99	555	646
Venezuela	132	1,463	1,516	382	3,175	4,009
TOTAL LATIN AMERICA	1,697	8,755	9,778	4,449	26,159	26,442
Europe:						
Albania	4	.....	.....	5	25	.....
Austria	2	25	234	8	1,453	1,144
Belgium and Luxemburg	501	3,095	1,609	1,270	9,434	6,129
Bulgaria	1	.....	7	2	92	10

* See Commonwealth Countries prior to 1948.
†See Foreign Countries from January 1, 1949.

Canadian Exports, by Countries—*Concluded*

Country	March			January—March		
	1938	1948	1949	1938	1948	1949
FOREIGN COUNTRIES—Con.	(Thousands of Dollars)					
Europe:—Con.						
Czechoslovakia	244	1,523	73	467	5,873	826
Denmark	26	215	424	91	508	1,382
Estonia	.....	.....	.....	1	.....	.....
Finland	36	335	53	82	730	125
France	956	2,880	1,648	2,261	15,550	8,034
Germany	1,307	316	1,958	3,092	1,813	7,046
Greece	189	676	178	190	3,814	733
Hungary	.....	40	13	.....	377	46
Iceland	1	304	252	2	383	453
Italy	295	1,599	532	396	7,805	2,652
Latvia	33	.....	.....	57	.....	.....
Lithuania	.....	.....	.....	1	.....	.....
Netherlands	858	4,744	692	2,259	9,713	3,245
Norway	993	1,103	803	1,672	5,145	3,000
Poland	103	509	5	180	1,513	91
Portugal	11	119	78	32	651	544
Azores and Madeira	.....	24	20	.....	57	31
Roumania	.....	11	3	16	106	33
Spain	18	59	26	19	149	111
Sweden	563	820	91	891	1,728	974
Switzerland	48	1,499	460	143	5,040	6,378
U.S.S.R. (Russia)	70	4	10	238	47	24
Yugoslavia	1	49	35	3	358	92
TOTAL EUROPE	6,260	19,949	9,204	13,378	72,364	43,103
Other Foreign Countries:						
Afghanistan	.....	8	.....	.....	13	2
Arabia	.....	.....	530	.....	.....	940
Belgian Congo	6	102	290	32	362	672
Burma*	.....	3	5	.....	55	40
China	389	3,483	1,678	632	10,007	4,342
Greenland	.....	.....	1	.....	23	8
Egypt	30	423	801	69	2,586	2,689
Ethiopia	.....	4	2	.....	17	20
French Africa	19	157	96	33	984	1,146
French East Indies	2	30	34	7	77	72
French Guiana	1	6	.....	2	55	.....
French Oceania	16	2	17	31	10	30
French West Indies	25	142	13	36	305	14
Madagascar	1	124	3	2	319	19
St. Pierre and Miquelon	23	47	75	46	255	257
Iran	20	29	206	36	147	469
Iraq	4	41	206	16	122	247
Transjordan	.....	.....	25	.....	.....	128
Tripoli	.....	.....	.....	.....	1	.....
Other Italian Africa	.....	.....	.....	.....	.....	.....
Indonesia	2,659	229	416	6,860	770	822
Japan	.....	1	10	.....	10	12
Korea	3	8	21	7	21	31
Liberia	22	96	99	29	180	280
Morocco	75	893	404	184	1,658	1,681
Netherlands Guiana	4	45	67	10	198	210
Netherlands Antilles	26	166	153	55	505	572
Palestine*	.....	.....	708	.....	.....	2,471
Philippine Islands	166	619	789	453	2,400	2,261
Portuguese Africa	182	97	574	499	374	1,121
Portuguese Asia	.....	14	14	.....	30	52
Siam	3	30	45	6	64	191
Canary Islands	.....	.....	1	.....	1	14
Spanish Africa	.....	14	1	.....	14	2
Syria	7	31	367	18	84	2,131
Turkey	418	33	746	418	97	1,025
TOTAL OTHER FOREIGN	4,101	6,877	8,397	9,481	21,744	23,971
TOTAL FOREIGN COUNTRIES	34,962	148,533	151,024	87,221	433,902	441,969
TOTAL DOMESTIC EXPORTS	73,329	228,369	216,787	203,248	672,022	658,811

*See Foreign Countries from January 1, 1948.

Extensive Development of Hydro Resources Planned by Pakistan

Lack of perennial rivers, due to scanty rainfall, increases difficulties—Objective is to make country independent of Indian sources of power—Several projects to be undertaken, of which the most important is on the Karnafuly River.

By G. A. Browne, Acting Canadian Government Trade Commissioner

KARACHI.—Shortage of coal and oil fuels, together with their costs, has turned attention in Pakistan to the development of her hydro-electric resources. In a country where the rainfall is slight (except in Eastern Pakistan), the lack of perennial rivers makes the problem a difficult one, to be solved only by the storing of snow waters and the waters from the hills, where the rainfall is greatest. This solution presents its own problems, since the development of storage sites would not infrequently mean the inundation of considerable areas of productive land. This is perhaps balanced by the extension of the hydro projects into the irrigation sphere, opening up to cultivation hitherto arid unworked areas. A potential of at least 500,000 kw. is estimated for Western Pakistan, and the Industries Conference, in the spring of 1948, called for the earliest realization of this figure.

To this end, on the advice of a leading electric engineering consultant, the Government of Pakistan has created a central engineering authority, comprising a civil engineering branch for irrigation and hydraulics and an electrical branch, or Power Board, for electrical development to deal with power generation, transformation and transmission and policy questions of development.

Objective is Independence of Indian Supply of Power

Heretofore, the most populous and more highly industrialized district of Western Pakistan, Lahore has obtained its power and lighting from the Jogindranagar development, located in what is now India. As India requires all Jogindranagar's output for domestic use, the highest priority is given by Pakistan to the early completion of such West Punjab schemes as Mianwali and Rasul to release the Lahore district from dependence on Indian supply.

The present generating capacity in Pakistan of both thermal and hydro-electric stations is as follows: (1) Present installed thermal capacity, 67·73 meg/W.; (2) present installed hydro-electric capacity, 9·63 meg/W.; (3) estimated potential hydro-electric capacity, 404·25 meg/W.

Several Projects in Blueprint Stage

New hydro-electric capacity totalled 204·25 meg/W., some of which projects outlined herewith, are at present in the blueprint stage or building.

Rasul Hydro-electric Scheme.—This project, which has been under construction for two years and is expected to be ready in 1949, is intended to supply power for tube-well irrigation in districts of Western and Central Punjab and to supply power and lighting to twenty-eight towns to the north and west of Lahore. This $25 million project will develop 22,000 kw. when opened.

Mangla Scheme.—A power station at Mangla on the Upper Jhelum Canal will provide 10,000 kw. and will eventually be grid-linked with the Rasul scheme.

Pakistan—Mohatta Palace, which houses the Ministry of Foreign Affairs and Commonwealth Relations, and the Ministry of States and Frontier Regions.

Malakand Development.—This hydro development came into operation in 1938 and, utilizing the 250-foot fall from an extension of the Benton irrigation tunnel above the Upper Swat Canal at Malakand, the station generates 9,600 kw., the power being transmitted at stepped-up voltages of 66 kw. to Mardan and Peshawar, the latter 74 miles distant. It is now proposed to install additional generating sets, accommodation for which was arranged in the initial plans, and thus increase output to a total of 20,000 kw.

Dargai.—The Dargai scheme is a simple one involving the utilization of the flow from the Malakand scheme farther up the valley and is really an extension of Malakand. A capacity of 15,000 kw. will be installed, to bring the total Dargai-cum-Malakand output to 35,000 kw. in the next three or four years.

Warsak.—This is a dual-purpose scheme for a dam in a narrow gorge of the Kabul river, which, besides taking the place of the Jogindranagar (India) station in supplying Lahore and the rest of adjacent West Punjab, will also supply power to the quarries and mines of the Peshawar and Kohat districts as well as irrigating 65,000 acres of those same presently arid areas.

There are other plans for power development at Mianwali and Attock in the West Punjab in connection with thermal electric developments at Karachi, Chittagong, Dacca, Rawalpindi, Lyallpur, Multan, Hyderabad Sind and Rohri-Nara in Sind.

Karnafuly Project is Most Important

Partition has roused widespread interest in the resources of the province of East Bengal and, along with consideration of new schemes to develop Pakistan's eastern wing, old ones, begun in the early twenties but subsequently dropped or not pursued, are rapidly being revised.

The biggest scheme falling in this category is the hydro-electric and flood control project over the Karnafuly river at Chittagong. Planned in 1906-07 but dropped as uneconomic, the project, estimated to cost Rs.5 crores (Can.$15,000,000), has been taken up again, and work has already started—the target being to complete it within four years—so that in 1952 it will control annual floods in the river and will supply power to sustain large-scale industrial enterprises.

Preliminary work on this scheme started soon after partition. The necessary cross and longitudinal sections are being prepared, together with the bed slope of the Karnafuly river. On completion of these sections,

the height of the dam will be estimated. Geological and hydrological studies are continuing. An aerial contour survey is under preparation, and the contour maps are expected to be ready in November.

Preliminary Investigations Begun

The preliminary investigations of the different sites have been begun, and design work is to begin shortly. From the results of various designs, a suitable type will be selected, and specifications will be prepared and completed soon. The access road alignment has been marked out, and considerable jungle cutting on this alignment has been done.

The current year's budget has given recognition to the project, for which an expenditure of Rs.600,000 has been approved. Dr. Savage, the well-known American expert on high dams, has been invited to inspect the dam site, and is expected to visit the province in November of this year.

Divided into five phases, the tentative program of work is as follows: June, 1948, to November, 1948, preparation period; November, 1948, to February, 1949, site clearing; February, 1949, to September, 1949, preparation for construction; October, 1949, to October, 1951, construction period; May, 1952, completion of project.

The project, which may well be described as a multi-purpose one, is intended to control the waters of the Karnafuly river, to reduce the incidence of heavy flooding, to ensure a minimum fixed flow for the purpose of generating hydro-electric power, to increase the facilities for river transport and, at the same time, assist in the development of the Port of Chittagong. Other benefits which will accrue from the project are the extension of the access road necessary for construction purposes, which is to become an arterial road for the Chittagong hill tracts, and the extension of industries based on hydro-electric power.

The project is expected to yield about 40,000 kilowatts of electricity, which will be available to consumers at considerably lower cost than is being paid at present for steam-generated electricity.

The population of the area coming under the project is predominantly rural, the only important town being Chittagong. The main crop of the district is rice, with several tea gardens toward the north. Flooding has caused much distress and damage to the extent of many lakhs of rupees. In addition to heavy rains in the catchment area, uncontrolled soil erosion is reducing the efficiency of the rivers during the low-water season. The scheme tentatively aims at designing a system of two dams, one at Barkal, some 80 miles upstream from Chittagong, and one at Subalong further ahead.

Forest Resources Scanty

Pakistan forest resources are scanty, only about 6 per cent of the total area being forested. This is due in part to the extremely dry climate of Western Pakistan, which does not lend itself to luxuriant natural vegetation, and the heavy fuel demands of the large population on the sparse forest growths.

Distribution of Forest Area

Province	Total Area Sq. Miles	Area Sq. Miles	Per Cent of Total
Baluchistan	54,500	2,218	4.00
N.W.F.P.	14,300	460	3.20
Sind	48,100	1,135	2.35
Punjab	62,100	4,034	6.50
East Bengal	54,100	5,602	10.00
Total	233,100	13,449	5.7

The dry tropical and sub-tropical forest vegetation of Western Pakistan falls into five categories, which vary with the climate and altitude of each district. The hill forests of Baluchistan and N.W.F.P. have both soft evergreens and hardwoods of some economic importance, deodar (cedar), kail, chil, spruce, fir and juniper predominating. The furniture and sports goods industries draw their supplies of walnut, ash, maple, chestnut, birch and poplar from these districts. Cutting of these species in N.W.F.P. generally is limited, the greater supply being on the borders and within Kashmir. The northeast submontane districts of West Punjab grow deciduous species such as shisham, a heavy grained furniture wood not unlike walnut, and jeepul, jaman and sirus of somewhat less value. The plains of West Punjab and Sind support some small scrub forests of acacias and date palms, and mangroves flourish.

Western Pakistan's reforestation schemes must of necessity be long-term and are totally dependent, owing to lack of adequate rainfall, on increased irrigation.

Eastern Pakistan has some ten thousand acres under teak in the hill tracts, and her afforestation plans, being not dependent on rainfall or irrigation, are consequently possible of early execution. An important part of East Bengal's forest wealth is in the extensive bamboo forests in the Chittagong hill tracts, these plantations currently providing large quantities of bamboo for the Indian pulp and paper industry. Other main forest growths are in Sylhet, Nymensingh and Khulna districts.

Royal Family Much Interested in Canadian Exhibit at the British Industries Fair

Minister of Trade and Commerce welcomed distinguished visitors— Government officials and leading businessmen impressed with theme of display— Inquiries received for Canadian goods.

LONDON, May 3, 1949.—(FTS)—Her Majesty the Queen, Her Royal Highness the Princess Elizabeth, His Royal Highness the Duke of Edinburgh, Her Majesty Queen Mary and Her Royal Highness the Princess Royal visited the British Industries Fair today. The Right Hon. C. D. Howe, Minister of Trade and Commerce, and M. W. Mackenzie, Deputy Minister of Trade and Commerce, were introduced to members of the royal party by the Right Hon. Harold Wilson, President of the Board of Trade, and described the Canadian display at the British Industries Fair. It was much admired and aroused great interest. Canada's evident desire to attract more British goods, and to encourage British manufacturers to explore the Canadian market, was apparently appreciated.

Leading bankers, government officials, representatives of trade associations and other prominent businessmen attended a special showing, and also displayed much interest in the Canadian exhibit.

During the first two days, trade inquiries for Canadian products have been received from Israel, India, the Netherlands and Nigeria, in addition to a large number from the United Kingdom. Canadian buyers wishing to contact British manufacturers have also discussed their problems with Canadian Trade Commissioners in attendance at the trade fair.

Leopoldville Trade Fair Postponed

Leopoldville, April 11, 1949.—(FTS)—Plans for a trade fair in Leopoldville, which it was proposed should be held in 1950, have been postponed for several years.

Official Japanese Exchange Rate Became Effective Last Week

One United States dollar valued at 360 Japanese yen, effective April 25—Foreign trade and exchange transactions to be continued through Japanese Board of Trade, until new procedure has been evolved—Conversion restrictions still prevail.

(Editor's Note—The approximate prewar rate was 4 yen to one United States dollar.)

TOKYO, April 30, 1949.—(FTS)—Effective April 25, 1949, an official foreign exchange rate of 360 Japanese yen to one United States dollar was established by direction of the Supreme Commander of the Allied Powers (SCAP). This rate applies to all authorized foreign trade and exchange transactions, including those for which the military conversion rate was formerly applicable. Rates for other currencies will be based on the official United States dollar values of such currencies, as registered with the International Monetary Fund, translated into yen-dollar ratios.

Foreign trade and exchange transactions will be continued through the *Boeki-Cho* (Japanese Board of Trade) at the official rate and under existing trade and control procedure. However, the Japanese Government has been instructed to submit plans that will permit of such foreign exchange transactions being executed through the Foreign Exchange Control Board.

To preclude any interruption of transactions to be implemented under export contracts approved prior to the effective date of the official rate, the Japanese Government has been directed to take whatever action is necessary to insure that the exporters of Japanese goods fulfil all such controls in good faith and in accordance with provisions of the exchange directive.

Export contracts now in force and approved prior to April 25, 1949, which require the use of imported raw materials for their execution, are to be discharged in accordance with the terms of yen payments previously arranged between the Japanese Government and exporters of Japanese goods. Necessary adjustments of yen payments may be made only to the extent that imported raw materials used in the production of goods for export under the contracts are procured from the Japanese Government, and are paid for at yen prices in excess of those effective at the time of approval of such contracts. Applications for such adjustments will be subject to review and approval by the Price Board.

The establishment of an exchange rate does not change existing restrictions upon the conversion of yen to foreign currencies, or upon the holding of foreign currencies. The sale of foreign exchange for yen can be consummated only through foreign exchange controls now being formulated.

French Exchange Rate Slightly Changed

Paris, April 27, 1949.—(FTS)—The commercial rate of exchange for Canadian dollars in France has been set at 271·70 francs to the dollar (buying), and 272·50 francs to the dollar (selling). The open market rate for United States dollars reached 329·80 francs yesterday. This should also apply to Canadian dollars, which will enable tourists with letters of credit and travellers cheques to take advantage of the more favourable rate of exchange.

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, and to discuss the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following offices in the areas concerned:

Ottawa—Foreign Trade Service Department of Trade and Commerce

Brantford—Board of Trade.
Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Galt—Board of Trade.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kingston—Chamber of Commerce.
Kitchener—Chamber of Commerce.
London—Chamber of Commerce.
Moncton—Board of Trade.
Montreal—Montreal Board of Trade.
Niagara Falls—Chamber of Commerce.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Sarnia—Chamber of Commerce.
Saskatoon—Board of Trade.
Sherbrooke—Chamber of Commerce.
St. Catharines—Chamber of Commerce.
Toronto—Canadian Manufacturers' Association.
Vancouver—Department of Trade and Commerce, 355 Burrard Street.
Victoria—Department of Trade and Industry.
Welland—Board of Trade.
Windsor—Chamber of Commerce.
Winnipeg—Canadian Manufacturers' Association.

R. E. Gravel, Assistant Commercial Secretary for Canada in Buenos Aires, Argentina, has returned home on leave before proceeding to another post. He will tour Canada, discussing trade conditions in Argentina, Uruguay and Paraguay with businessmen interested in that territory.

Quebec City—May 9-10.
Montreal—May 11-23.
Kingston—May 25.
Batawa—May 26.
Toronto—May 27-June 7.
Hamilton—June 8.
St. Catharines—June 9.
Welland—June 10.
Niagara Falls—June 11.
Brantford—June 13.
London—June 14.
Windsor-Walkerville—June 15.
Sarnia—June 16.
Kitchener—June 17-18.
Galt-Preston—June 20.
Winnipeg—June 23.
Vancouver-Victoria—June 27-July 2.
Ottawa—July 14-16.

C. Blair Birkett, Canadian Government Trade Commissioner in Guatemala since 1946, has returned home on leave before proceeding to another post. He is making a tour of Canada, discussing trade conditions in Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua with businessmen interested in that territory.

Toronto—June 6-11.
Hamilton—June 13.
Kitchener—June 14.
Winnipeg—June 16.
Vancouver—June 20-25.
Ottawa—June 30.

Britain Speeds Plans for Increased Grassland Yield

Plans have been speeded for a 20 per cent increase in Britain's grassland yield, according to a recent announcement by the Committee on Industrial Productivity. The success of this scheme, which involves an increase of capacity for producing nitrogenous fertilizers, will mean a saving to Britain of at least $160 million in dollar imports yearly and the feeding of an extra four million people on home produce.—*(United Kingdom News)*

Trade and Tariff Regulations

Argentina Revises Exchange Control Procedure

Buenos Aires, April 12, 1949.—(FTS)—Procedure governing imports into Argentina is set forth in a circular of the Argentine Central Bank, dated March 15 but not published until some time later. In order to provide for the introduction of new regulations, all banks were instructed by the Central Bank on February 1, 1949, that they should not make further remittances abroad, with certain specified exceptions. Later instructions indicated the treatment that should be applied to goods in transit or in Argentine ports, and dealt with the revalidation of outstanding exchange permits, with goods arriving without permit and with certain other routine matters.

The circular of March 15 contains two lists of goods that may be imported by Argentina. The first, which includes 1,165 tariff items, covers essential commodities for which the Central Bank is prepared to consider applications for prior exchange permits "without the use of exchange", provided the importer possesses funds of his own abroad sufficient to pay for the merchandise, and that these funds are on deposit in a bank abroad as at December 31, 1948. The Central Bank is also prepared, subject to prior study, and again without granting foreign exchange, to consider applications for permits to import goods in List No. 1, imported solely as an investment capital.

The second list covers goods of first priority. Permits granted for imports of goods in this list carry with them the right to purchase the appropriate foreign exchange from or through the Central Bank. List No. 2 is divided into five groups, namely: (*a*) chemical and pharmaceutical products and others for medicinal purposes (265 items); (*b*) fuels and lubricants (13 items); (*c*) iron, steel and other metals (24 items); (*d*) lumber and paper (13 items); and (*e*) other goods, including asbestos, needles for looms, sand and gravel and refractory materials (17 items). For goods in groups (*a*) and (*b*), applications will be considered, subject to prior study, for imports from all countries (including Canada). For goods in groups (*c*), (*d*) and (*e*), applications will be considered only if importation is to be made from the areas of the Dutch florin, the French franc, the Belgian franc, the pound sterling, the Italian lira, the Spanish peseta, and from Bolivia, Brazil, Czechoslovakia, Chile, Denmark, Finland, Hungary, Paraguay, Peru, Poland, Roumania, Sweden, Switzerland, Uruguay and Yugoslavia. These are all countries with which Argentina has bilateral agreements or bordering on Argentina. Importers, when making application for permits, must provide details of offers from at least two countries of origin, one of which must be from one of those specified in the foregoing group.

New forms are provided for applications for prior exchange permits. The importer is required to give fuller particulars than previously. The time limit of 30 days after date of application, during which the importer may withdraw his application without penalty, is still in effect. Within 30 days of receipt of approval of the permit from the Central Bank, the importer must complete arrangements for purchase abroad and bring proof to the Central Bank. The permit must then be used and the importer does not enjoy the privilege of withdrawing his application. Most important of all is that the expiry date of validity of the permit is no longer automatic and standard, whereas it was usually nine or twelve months. The Central Bank will set the expiry date for each permit, however, and will note the date on the permit. The importer must initiate clearance formalities in the Argentine customs on or before the expiry date of the permit. The shipping

date will no longer be the expiry date. Overseas exporters must, therefore, request from their customers the exact expiry date of the permit, and arrange to have the goods arrive in the Argentine port of entry by that date.

Argentine consuls may visa consular invoices, commercial invoices and bills of lading only if these concern goods for which the exporter declares that the Argentine importer holds the requisite exchange permit. The exporter must support his declaration by quoting the number and date of the permit. Furthermore, Argentine consuls are required to verify the declaration by seeing the letter, cable or other document, from the Argentine importer, which contains the information.

Goods for which the importer has neither applied for nor obtained the necessary permit will not be permitted entry and must be reshipped.

ECA Requires Specific Data on Documents

Paris, April 2, 1949.—(FTS)—Procedure governing the provision of supplies to countries participating in the European Recovery Program is set forth in a notice to importers, who should furnish their suppliers with the procurement authorization number, and notify them of any special obligations imposed by the Economic Co-operation Administration. This number should appear on all documents exacted by ECA for submission by the supplier. All contracts or documents must show:

(*a*) Date, which should be subsequent to that of the procurement authorization concerned.

(*b*) Description of the goods to be supplied or service rendered, with the country of origin.

(*c*) Quantity of the goods to be supplied or character of the service to be rendered, with the value in United States dollars. If the price has not been established, the contract must indicate the methods to be used in its deermination. Contracts may include references to standard commercial types of contracts or settlements.

(*d*) Conditions and date of delivery. The latter is of particular importance, as delivery must be effected during the quarter indicated by the fourth group of figures in the procurement authorization number.

(*e*) Conditions of payment.

(*f*) Name and address of the supplier, importer and, if pertinent, that of the agent or broker concerned.

(*g*) Amount of the intermediary's commission.

(*h*) Names and qualifications of the signers of the contract.

Importers should request shippers to send one copy of the bill of lading by air mail to the E.C.A. Mission, United States Embassy, country of destination.

ECA is able only to finance the purchase of supplies or the provision of services realized at a price which is not higher than the market price at the time of procurement. In view of the fact that control may not be exercised until payments have been made by United States banks, importers are urged to pay special attention to the question of price. They should remind their suppliers that United States banks will not be able to assure payment to them, except on presentation of certificates conforming to established examples. When it is revealed that payment should not have been made for certain goods or services, ECA reserves the right to exact immediate repayment of the amount involved from the country concerned. The issue of licences by the importer's government should not be construed as approval by the American authorities of the price.

Marine insurance premiums cannot be financed through ERP channels. It is recommended that importers negotiate their imports f.o.b. ship.

United States Issues Marking Regulations for Newfoundland Products

Washington, April 20, 1949.—(FTS)—With the union of Newfoundland with Canada at midnight March 31, 1949, articles manufactured or produced in Newfoundland may be marked "Newfoundland" or "Canada" to indicate the name of the country of origin under the marking provisions of the Tariff Act of 1930, as amended.

The United States marking regulations provide that every article of foreign origin (or its container), with some exceptions, imported into the United States, must be marked in such a manner as to indicate to the ultimate purchaser in the United States the English name of the country of origin of the article.

Greek Social Insurance Structure Being Reorganized

Athens, February 28, 1949.—(FTS)—All administrative functions of the Institution of Social Insurance (IKA), a state fund, have been transferred to an American administrator, named toward the close of 1948, to reorganize Greek social insurance and to provide it with more efficient administration. IKA, the most important of the country's social insurance organizations, which groups under its wing all workers not otherwise protected against illness, accident and old age, has been in the process of reorganization at the suggestion of the United States mission to Greece. The intention is to incorporate eventually into a single unit the various insurance organizations which would function under state social insurance supervision.

Many social insurance organizations, such as old age and sickness insurance, pension and accident funds and others, have previously operated under the supervision of the Ministry of Labour. About half of these were organizations of insurance proper and the remainder assistance funds.

Canadian Shipments to Brazil Largely Covered by Sight Drafts

Rio de Janeiro, April 22, 1949.—(FTS)—Canadian export shipments to Brazil are largely covered by sight drafts attached to the shipping documents, which are released to the importers against a cruzeiro deposit covering the total amount of the draft at the Bank of Brazil's rate for United States dollars.

The cruzeiro deposit made by the importer is irrevocable and, in theory, belongs to the drawer of the draft, but the latter may only come into possession of this deposit when exchange is made available by the Bank of Brazil for the conversion of the deposit into United States dollars. It has happened occasionally, particularly in the case of perishable goods, that importers, after inspecting the goods, have refused to make the necessary application for exchange on the grounds that the goods arrived in bad condition, were not according to samples, or for some other reason, and try to force the exporters to agree to a discount.

In order to protect themselves, Canadian exporters and Canadian banks forwarding drafts to banks in Brazil for collection, should always specify in their instructions that the documents should be delivered only against a deposit in cruzeiros and application for exchange. The importer's application for exchange, in principle, should be accompanied by certain of the shipping documents, as well as evidence of customs clearance, but in practice, applications are accepted if they are accompanied by a written engagement to submit the necessary documents within 30 days.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings is furnished by the steamship companies and agents concerned. This is the latest available, and is subject to change after *Foreign Trade* has gone to press.

The loading date and name of ship are not indicated in some instances, as information available is not sufficiently definite to mention the ship concerned. Exporters should seek further details from the operator or agent mentioned.

Ships loading within ten days of the publication date of this issue are not included.

Departures from Montreal

* Calls at Halifax about four days later.
† Calls at Quebec about two days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden—			
Port Aden	June 1–6	*Sommelsdijk*	Cunard Donaldson
Africa-East—	May 13–23	*Cambray*	Elder Dempster
	May 14–24	*Biafra*	Elder Dempster
Lourenço Marques	May 25	*Catrine*	Shipping Limited
	May 31–June 10	*Cabano*	Elder Dempster
	June 25	*Constantia*	Shipping Limited
Lourenço Marques	May 18–25	*Thorshall*	Kerr Steamships
Beira	June 25	*Thorsisle*	Kerr Steamships
Mombasa			
Africa-South—	May 13–23	*Cambray*	Elder Dempster
	May 14–24	*Biafra*	Elder Dempster
Cape Town	May 18–25	*Catrine*	Shipping Limited
Port Elizabeth	May 20–25	*Digby County*	March Shipping
East London	May 31–June 10	*Cabano*	Elder Dempster
Durban	June 25	*Constantia*	Shipping Limited
	June 25	*Thorsisle*	Kerr Steamships
Argentina—			
Buenos Aires	May 18–21	*Bowhill*	Cunard Donaldson
Buenos Aires	June 13–16	†*Brazilian Prince*	Furness Withy
Australia—			
Brisbane			
Sydney	May 13–19	*Port Wyndham*	Montreal Australia
Hobart			New Zealand Line
Geelong	July 2	*Ashburton*	Montreal Australia
Melbourne			New Zealand Line
Adelaide			
Freemantle	July 2	*Ashburton*	Montreal Australia
			New Zealand Line
	May 20	*Prins Alexander*	Shipping Limited
	May 20–25	*Rouen*	Furness Withy
	May 20–27	*Vasaholm*	Swedish American
	May 21	*Kent County*	Canada Steamships
Belgium—	May 23–30	*Beaconsfield*	Cunard Donaldson
Antwerp	May 24	*Makefjell*	Brock Shipping
	May 24	*Hedel*	Shipping Limited
	May 31	*Grey County*	Canada Steamships
	May 31	*Prins Willem Van Orange*	Shipping Limited
	June 10	*Prins Willem IV*	Shipping Limited
	June 17–23	*Tunaholm*	Swedish American

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Brazil—			
Rio de Janeiro	May 18–21	*Bowhill*	Cunard Donaldson
Santos	June 13–16	†*Brazilian Prince*	Furness Withy
Ceylon—			
Colombo	May 15–25	*Derwenthall*	McLean Kennedy
Colombia—			
Barranquilla	May 26–30	**Polykarp*	Swedish American
Cuba—	May 18–23	**Tidaholm*	Swedish American
Havana	May 27–28	*A Ship*	Saguenay Terminals
	June 10–15	**Stegeholm*	Swedish American
Denmark—	May 20–27	*Vasaholm*	Swedish American
Copenhagen	May 26–28	*Erland*	Swedish American
	June 2	*Oris*	Brock Shipping
	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
Egypt—			
Alexandria			
Port Said	June 1–6	*Sommelsdijk*	Cunard Donaldson
Suez			
Finland—	May 20–27	*Vasaholm*	Swedisn American
Helsinki	May 26–28	*Erland*	Swedish American
	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
France—	May 20	*Prins Alexander*	Shipping Limited
Le Havre	May 20–25	*Rouen*	Furness Withy
	May 20–27	*Vasaholm*	Swedish American
	May 21	*Kent County*	Canada Steamships
	May 24	*Hedel*	Shipping Limited
	May 31	*Grey County*	Canada Steamships
	May 31	*Prins Willem Van Oranje*	Shipping Limited
	June 10	*Prins Willem IV*	Shipping Limited
	June 17–23	*Tunaholm*	Swedish American
Marseilles	May 20–25	*Capo Arma*	Furness Withy
Germany—	May 20	*Prins Alexander*	Shipping Limited
Hamburg	May 20–27	*Vasaholm*	Swedish American
	May 23–30	*Beaconsfield*	Cunard Donaldson
	May 24	*Hedel*	Shipping Limited
	May 31	*Prins Willem Van Oranje*	Shipping Limited
	June 10	*Prins Willem IV*	Shipping Limited
	June 17–23	*Tunaholm*	Swedish American
Greece—			
Piraeus	June 15	*A Ship*	Monsen Clarke
India and Pakistan—			
Bombay			
Karachi	May 12–20	*Gulfside*	March Shipping
Madras	May 15–25	*Derwenthall*	McLean Kennedy
Calcutta			
Indonesia—			
Batavia			
Samarang			
Soerabaya	June 1–6	*Sommelsdijk*	Cunard Donaldson
Cheribon			
Belawan-Deli			
Ireland—			
Dublin	May 29–June 3	*Lord Glentoran*	McLean Kennedy
Dublin	May 25	*A Ship*	Shipping Limited
Cork			

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Italy—			
West Coast Ports	May 20–25	*Capo Arma*	Furness Withy
Genoa	June 15	*A Ship*	Monsen Clarke
Malaya—			
Penang, Port Swettenham	June 1–6	*Sommelsdijk*	Cunard Donaldson
Malta—			
Valetta	May 14–22	*A Ship*	Montreal Shipping
Mediterranean—			
Central and Western Areas	May 14–22	*A Ship*	Montreal Shipping
	May 28–June 3	*Maria Theresa G.*	Montreal Shipping
Mexico—			
Tampico	May 18–23	**Tidaholm*	Swedish American
Veracruz	June 10–15	**Stegeholm*	Swedish American
Netherlands—			
Amsterdam, Rotterdam	May 20	*Prins Alexander*	Shipping Limited
	May 20–27	*Vasaholm*	Swedish American
	May 21	*Kent County*	Canada Steamships
	May 23	*Makefjell*	Brock Shipping
	May 23–30	*Beaconsfield*	Cunard Donaldson
	May 24	*Ornefjell*	Brock Shipping
	May 24	*Hedel*	Shipping Limited
	May 31	*Prins Willem Van Oranje*	Shipping Limited
	May 31	*Grey County*	Canada Steamships
	June 10	*Prins Willem IV*	Shipping Limited
	June 17–23	*Tunaholm*	Swedish American
Netherlands Antilles—			
Willemstad	May 26–30	**Polykarp*	Swedish American
New Zealand—			
Auckland, Wellington	May 21–27	*Ottawa Valley*	Montreal Australia New Zealand Line
Lyttleton, Dunedin	July 9	*Port Albany*	Montreal Australia New Zealand Line
Northern Ireland—			
Belfast	May 25	*Ramore Head*	McLean Kennedy
Norway—			
Oslo	May 20–27	*Vasaholm*	Swedish American
Kristiansand	May 26–28	*Erland*	Swedish American
Stavanger	May 27–June 1	*Topdalsjord*	Kerr Steamships
Bergen	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
Trondheim	May 27–June 1	*Topdalsfjord*	Kerr Steamships
Bergen, Oslo, Stavanger	June 2	*Orin*	Brock Shipping
Poland—			
Gdynia, Gdansk	May 19–23	*Brush*	Swedish American
	May 20–27	*Vasaholm*	Swedish American
	May 26–28	*Erland*	Swedish American
	June 7–11	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
Portugal—			
Lisbon	May 26–June 3	*Maria Theresa G.*	Montreal Shipping
Puerto Rico—			
San Juan	May 26–30	**Polykarp*	Swedish American

Departures from Montreal—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Singapore	June 1–6	*Sommelsdijk*	Cunard Donaldson
Sweden—			
Gothenburg	May 20–27	*Vasaholm*	Swedish American
Malmo	May 26–28	*Erland*	Swedish American
Norrkoping	June 7	*Helgasmith*	Montreal Shipping
Stockholm	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
Trieste	June 15	*A Ship*	Monsen Clarke
United Kingdom—			
Avonmouth	May 18–25	*Moveria* (r)	Cunard Donaldson
	May 21–26	*Montreal City*	Furness Withy
	May 26–June 2	*Delilian* (r)	Cunard Donaldson
	June 22–29	*Dorelian* (r)	Cunard Donaldson
Swansea	May 21–26	*Montreal City*	Furness Withy
Glasgow	May 15–22	*Salacia* (r)	Cunard Donaldson
	May 22–29	*Laurentia* (r)	Cunard Donaldson
	June 5–13	*Lismoria* (r)	Cunard Donaldson
	June 19–26	*Salacia* (r)	Cunard Donaldson
	June 26–July 4	*Laurentia* (r)	Cunard Donaldson
Hull	May 20–24	*Consuelo* (r)	McLean Kennedy
Liverpool	May 19–23	*Ascania* (r)	Cunard Donaldson
	May 19–23	*Ramore Head*	McLean Kennedy
	May 20–26	*Valacia* (r)	Cunard Donaldson
	May 27	*Empress of Canada* (r)	Canadian Pacific
	May 29–June 3	*Lord Glentoran*	McLean Kennedy
	June 13–20	*Arabia* (r)	Cunard Donaldson
	June 16–20	*Ascania* (r)	Cunard Donaldson
	June 24–30	*Fort Cadotte*	Cunard Donaldson
London	May 24	*Makefjell*	Brock Shipping
	June 2–9	*Sibley Park*	Cunard Donaldson
	June 11–18	*Asia* (r)	Cunard Donaldson
	June 17–24	*Fort Musquarro*	Cunard Donaldson
Leith Newcastle	May 16–21	*Cairnavon*	Furness Withy
Manchester	May 18–21	*Manchester City* (r)	Furness Withy
	May 25–28	*Manchester Regiment* (r)	Furness Withy
	June 1–4	†*Manchester Progress* (r)	Furness Withy
Uruguay—			
Montevideo	May 18–21	*Bowhill*	Cunard Donaldson
Montevideo	June 13–16	†*Brazilian Prince*	Furness Withy
Vancouver	May 20–25	*A Ship*	Monsen Clarke
Venezuela—			
Puerto Cabello La Guaira Maracaibo	May 26–30	**Polykarp*	Swedish American
West Indies—			
Antigua Barbados Bermuda			
British Guiana	May 17–26	**Alcoa Pioneer*	Alcoa Steamships
Dominica	May 27	**Lady Rodney* (r)	Canadian National
Grenada	May 31–June 9	**A Ship*	Alcoa Steamships
Montserrat	June 14–23	**A Ship*	Alcoa Steamships
St. Kitts St. Lucia St. Vincent Trinidad			

Departures from Quebec

*Calls at Montreal a few days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
British Honduras—			
Belize	May 28–30	**Benny* (r)	Saguenay Terminals
Canal Zone—			
Cristobal	May 28–30	**Benny* (r)	Saguenay Terminals
Colombia—			
Barranquilla	May 28–30	**Benny* (r)	Saguenay Terminals
Costa Rica—			
Port Limon	May 28–30	**Benny* (r)	Saguenay Terminals
Cuba—			
Havana	May 28–39	**Benny* (r)	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo	May 27–28	**Askepot*	Saguenay Terminals
Ciudad Trujillo	June 7–8	**Congo*	Saguenay Terminals
Guatemala—			
Puerto Barrios	May 28–30	**Benny* (r)	Saguenay Terminals
Haiti—			
Port au Prince	June 7–8	**Congo*	Saguenay Terminals
Netherlands—			
Amsterdam	May 18–19	*Kota Inten*	Furness Withy
Rotterdam	June 1–2	*Tabinta*	Furness Withy
Netherlands Antilles—			
Curaçao	June 7–8	**Congo*	Saguenay Terminals
United Kingdom—			
Greenock, Liverpool	June 8–12	*Franconia* (r)	Cunard Donaldson
Liverpool	July 8	*Franconia* (r)	Cunard Donaldson
London	May 15–19	*Scythia* (r)	Cunard Donaldson
London	June 5–9	*Samaria* (r)	Cunard Donaldson
London	June 19–23	*Scythia* (r)	Cunard Donaldson
Venezuela—			
La Guaira, Maracaibo, Puerto Cabello, Las Piedras	May 27–28	**Askepot*	Saguenay Terminals
La Guaira, Puerto Cabello, Maracaibo	June 7–8	**Congo*	Saguenay Terminals

Departures from Halifax

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom—			
Liveroool	May 22–27	*Newfoundland* (r)	Furness Withy
Liverpool	June 8–13	*Nova Scotia* (r)	Furness Withy
Southampton	June 6	*Aquitania*	Cunard Donaldson
Southampton	July 2	*Aquitania*	Cunard Donaldson

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—	May 28–June 14	*Riley*	North Pacific
	June	*Fotini*	North Pacific
Lourenço Marques	June 7	*Radja*	Dingwall Cotts
	June 27	*Silvermaple*	Dingwall Cotts
Africa-South—			
Cape Town	May 28–June 14	*Riley*	North Pacific
Port Elizabeth	June	*Fotini*	North Pacific
East London	June 7	*Radja*	Dingwall Cotts
Durban	June 27	*Silvermaple*	Dingwall Cotts
Argentina—			
Buenos Aires	May 30	*Hindanger*	Empire Shipping
Australia—			
Sydney	May 26	*Sonoma*	Dingwall Cotts
Melbourne	Mid-June	*Parramatta*	Empire Shipping
Adelaide			
Sydney	May 20	*Aorangi*	Canadian Australasian
Belgium—	May 21	*Laurits Swenson*	Anglo Canadian
	May 25	*Guayana* (r)	Gardner Johnson
Antwerp	May 30	*Argentan*	Empire Shipping
	June 12	*Los Angeles* (r)	Gardner Johnson
	July 4	*Paraguay* (r)	Gardner Johnson
Brazil—			
Rio de Janeiro	May 30	*Hindanger*	Empire Shipping
Santos			
Canal Zone—	May 19	*Coastal Nomad*	Gardner Johnson
Balboa	June 1	*Santa Leonor* (r)	Gardner Johnson
Panama City	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	May 19	*Coastal Nomad*	Gardner Johnson
Cristobal	May 31	*Gunner's Knot*	Gardner Johnson
	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
Ceylon—			
Colombo	May 27	*Riouw*	Dingwall Cotts
Colombo	June 10	*Höegh Silverbeam*	Dingwall Cotts
Chile—			
Arica	May 30	*Hindanger*	Empire Shipping
Antofagasta	June 1	*Santa Leonor* (r)	Gardner Johnson
Valparaiso	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
China—			
Shanghai	June 3–4	*Mirrabooka*	Empire Shipping
Colombia—	May 19	*Coastal Nomad*	Gardner Johnson
	May 31	*Gunner's Knot*	Gardner Johnson
Barranquilla	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson
	June 1	*Santa Leonor* (r)	Gardner Johnson
Buenaventura	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
Costa Rica—	May 19	*Coastal Nomad*	Gardner Johnson
	May 31	*Gunner's Knot*	Gardner Johnson
Puntarenas	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Ecuador—	June 1	*Santa Leonor* (r)	Gardner Johnson
Guayaquil	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
	May 19	*Coastal Nomad*	Gardner Johnson
El Salvador—	May 31	*Gunner's Knot*	Gardner Johnson
La Libertad	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson
Fiji—	May 20	*Aorangi*	Canadian Australasian
Suva	Late June	*Thor I*	Empire Shipping
	Late July	*Thorscape*	Empire Shipping
France—			
Le Havre	May 30	*Argentan*	Empire Shipping
Marseilles	May 19	*Stromboli*	Empire Shipping
Germany—	May 25	*Guayana* (r)	Gardner Johnson
Hamburg	June 12	*Los Angeles* (r)	Gardner Johnson
	July 4	*Paraguay* (r)	Gardner Johnson
Greece—			
Piraeus	May 23–June 7	*Rookley*	Anglo-Canadian
	May 19	*Coastal Nomad*	Gardner Johnson
Guatemala—	May 31	*Gunner's Knot*	Gardner Johnson
San Jose	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson
Hawaii—			
Honolulu	May 20	*Aorangi*	Canadian Australasian
Hong Kong	June 3–4	*Mirrabooka*	Empire Shipping
India and Pakistan			
Karachi	May 27	*Riouw*	Dingwall Cotts
Bombay	June 10	*Höegh Silverbeam*	Dingwall Cotts
Madras	June 5	*Saparoea*	Dingwall Cotts
Calcutta			
Indonesia—			
Batavia	May 27	*Riouw*	Dingwall Cotts
Soerabaya	June 5	*Saparoea*	Dingwall Cotts
Samarang	June 10	*Höegh Silverbeam*	Dingwall Cotts
Cheribon			
Italy—			
Genoa			
Leghorn	May 19	*Stromboli*	Empire Shipping
Naples	June 25	*Etna*	Empire Shipping
Venice			
Mediterranean—			
Central and Western Areas	May 23–June 7	*Rookley*	Canada Shipping
	May 19	*Coastal Nomad*	Gardner Johnson
Mexico—	May 31	*Gunner's Knot*	Gardner Johnson
Manzanillo	June 6	*Clove Hitch*	Gardner Johnson
Acapulco	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson
Netherlands—			
Amsterdam	May 30	*Argentan*	Empire Shipping
Rotterdam			

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
New Caledonia—			
Noumea	Late June	*Thor I*	Empire Shipping
Noumea	Late July	*Thorscape*	Empire Shipping
New Hebrides—			
Port Vila	Late June	*Thor I*	Empire Shipping
Port Vila	Late July	*Thorscape*	Empire Shipping
New Zealand—			
Auckland	May 20	*Aorangi*	Canadian Australasian
Norway—			
Oslo	May 21	*Laurits Swenson*	Anglo Canadian
Persian Gulf	May 27	*Riouw*	Dingwall Cotts
	June 19	*Höegh Silverbeam*	Dingwall Cotts
Peru—			
Callao	June 1	*Santa Leonor* (r)	Gardner Johnson
Mollendo	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
Salavery, Callao, Mollendo	May 30	*Hindanger*	Empire Shipping
Philippines—			
Manila, Iloilo, Cebu	June 10	*Höegh Silverbeam*	Dingwall Cotts
Manila, Iloilo	June 5	*Saparoea*	Dingwall Cotts
Manila	May 27	*Riouw*	Dingwall Cotts
Cebu	June 3–4	*Mirrabooka*	Empire Shipping
Samoa—			
Apia	Late June	*Thor I*	Empire Shipping
Apia	Late July	*Thorscape*	Empire Shipping
Pago-Pago	May 26	*Sonoma*	Dingwall Cotts
Singapore	May 27	*Riouw*	Dingwall Cotts
	June 5	*Saparoea*	Dingwall Cotts
Society Islands—			
Papeete	Late June	*Thor I*	Empire Shipping
Papeete	Late July	*Thorscape*	Empire Shipping
Sweden—			
Stockholm	May 25	*Guayana* (r)	Gardner Johnson
Gothenburg	June 12	*Los Angeles* (r)	Gardner Johnson
	July 4	*Paraguay* (r)	Gardner Johnson
Trieste	May 19	*Stromboli*	Empire Shipping
	June 25	*Etna*	Empire Shipping
United Kingdom—			
Manchester	May 25	*Jessmore*	Furness Withy
Manchester	Early July	*Pacific Exporter*	Furness Withy
Unstated Ports	May 21	*Laurits Swenson*	Anglo Canadian
	June	*Oceanside*	Seaboard Shipping
Venezuela—	May 19	*Coastal Nomad*	Gardner Johnson
	May 31	*Gunner's Knot*	Gardner Johnson
Maracaibo	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson

Foreign Trade Service Abroad

Cable address:—Canadian, unless otherwise shown.
Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. Brown, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.
Territory includes Uruguay and Paraguay.

Buenos Aires—W. B. McCullough, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

Australia

Sydney—C. M. Croft, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.
Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Melbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.
Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. Ausman, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.
Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Edificio Metropòle. Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—Acting Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. Maguire, Commercial Secertary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.
Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave, Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. Richardson. Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.
Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—A. W. Evans, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.
Territory includes Haiti, Dominican Repubic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.
Territory includes Aden, Anglo-Egyptian Sudan, Cyprus, Ethiopia, Iran, Iraq, Israel, Lebanon, Saudi Arabia, Syria and Transjordan.

France

Paris—J. P. Manion, Commercial Secretary, Canadian Embassy. Address for letters: 3 rue Scribe.
Territory includes Algeria, French Morocco and Tunisia.

Paris—J. H. Tremblay, Commercial Secretary (Agricultural Specialist), Canadian Embassy. Address for letters: 3 rue Scribe.
Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. Bachand, Canadian Economic Representative, Canadian Consulate, Economic Section, 145 Fuerstenbergerstrasse, A.P.O. 757, U.S. Army.
Cable address, Canadian Frankfurt/Main.

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.

Foreign Trade Service Abroad—*Continued*

Guatemala

Guatemala City—J. C. Depocas, Canadian Government Trade Commissioner, No. 20, 4th Avenue South. Address for letters: Post Office Box 400.
Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.
Territory includes South China, the Philippine Islands and French Indo-China.

India

New Delhi—Richard Grew, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 11.

Bombay—C. R. Gallow, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.
Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Italy

Rome—R. G. C. Smith, Commercial Secretary, Canadian Embassy, Via Saverio Mercadante 15-17.
Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—M. B. Palmer, Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.
Territory includes the Bahamas and British Honduras.

Japan

Tokyo—J. C. Britton, Commercial Representative, Canadian Liaison Mission, Canadian Legation Building.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Government Life Insurance Building. Address for letters: Post Office Box 1660.
Territory includes Fiji and Western Samoa.

Wellington—Dr. W. C. Hopper, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Government Life Insurance Building. Address for letters: Post Office Box 1660.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.
Territory includes Denmark and Greenland.

Pakistan

Karachi—R. K. Thomson, Acting Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.
Territory includes Afghanistan.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.
Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.
Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.
Territory includes Federation of Malaya, Indonesia, North Borneo, Brunei, Sarawak and Siam.

South Africa

Johannesburg—S. V. Allen, Commercial Secretary for Canada, Mutual Building, Harrison Street. Address for letters: Post Office Box 715.
Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.
Cable address, Cantracom.

Foreign Trade Service Abroad—*Concluded*

Cape Town—S. G. Tregaskes, Acting Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.
Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.
Cable address, Cantracom.

Sweden

Stockholm—F. H. Palmer, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.
Territory includes Finland.

Switzerland

Berne—Yves Lamontagne, Commercial Counsellor, Canadian Legation, Thunstrasse 95.
Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—T. G. Major, Canadian Government Trade Commissioner, 43 St. Vincent Street. Address for letters: Post Office Box 125.
Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

Turkey

Istanbul—G. F. G. Hughes, Acting Commercial Secretary for Canada, 20 Yeni Carsi Caddesi, Beyoglu. Address for letters: Post Office Box 2220, Beyoglu.

United Kingdom

London—A. E. Bryan, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Sleighing, London.

London—R. P. Bower, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).
Cable address, Sleighing, London.

London—W. B. Gornall, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Cantracom, London.

London—R. D. Roe, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Timcom, London.

Liverpool—M. J. Vechsler, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.
Territory includes the Midlands, North of England and Wales.

Glasgow—J. L. Mutter, Canadian Government Trade Commissioner, 200 St. Vincent Street.
Territory covers Scotland and Iceland.
Cable address, Cantracom.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.
Territory covers Northern Ireland .

United States

Washington—J. H. English, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. Paterson, Agricultural Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. Stewart, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Center.
Territory includes Bermuda.
Cable address, Cantracom.

New York City—M. B. Bursey, Canadian Government Trade Commissioner (Fisheries Specialist), British Empire Building, Rockefeller Center.

Boston—T. F. M. Newton, Consul of Canada, 532 Little Building, 80 Bolyston Street, Boston 16.

Detroit—J. J. Hurley, Consul of Canada, Canadian Consulate, 1035 Penobscot Building, Detroit 26, Michigan.

Chicago—Edmond Turcotte, Consul-General of Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. Duclos, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

San Francisco—H. A. Scott, Consul-General of Canada, 3rd floor, Kohl Building, 400 Montgomery Street.

Venezuela

Caracas—C. S. Bissett, Canadian Government Trade Commissioner, Canadian Consulate General, 8° Piso, Edificio America, Esquina Veroes.
Territory includes Netherlands Antilles.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations April 25	Nominal Quotations May 2
Argentina	Peso	Off.	·2977	·2977
		Free	·2085	·2085
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzerio	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5128	·5128
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0038	·0036
		Free	·0031	·0030
French Empire—African	Franc	....	·0076	·0073
French Pacific Possessions	Franc	....	·0202	·0201
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Indonesia	Florin	....	·3769	·3769
Iraq	Dinar	....	4·0300	4·0300
Ireland	Pound	....	4·0300	4·0300
Israel	Pound	....	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Japan	Yen	....	....	·0027
Mexico	Peso	....	·1436	·1405
Netherlands	Florin	....	·3769	·3769
Netherlands Antilles	Florin	....	·5302	·5302
New Zealand	Pound	....	4·0150	4·0150
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·4975	·4975
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Singapore	Dollar	....	·4701	·4701
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Lira	....	·3571	·3571
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5618	·5618
Venezuela	Bolivar	....	·2985	·2985

Trade Publications Available

ABC of Canadian Export Trade

Prepared by Export Division, Foreign Trade Service. Obtainable from King's Printer, Government Printing Bureau, Ottawa, for 25 cents a copy in Canada and 50 cents for delivery abroad.

Canada—Butcher, Baker, Grocer

Brochure, illustrating the extent to which foodstuffs are being shipped to the United Kingdom, prepared for distribution at the Dairy Show, in London, England, and to the provision trade in Great Britain. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Canadian Export Timbers

Brochure, illustrating and describing Canadian woods available for export, prepared for distribution at Building Trades Exhibition, in Manchester, England. Obtainable from King's Printer, Government Printing Bureau, Ottawa, for 25 cents.

Canadian Furs

Brochure, pertaining primarily to ranched furs, prepared for distribution at International Fur and Leather Fair, in Basle, Switzerland. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Canadian Certified Seed Potatoes

Folder, illustrating varieties most suitable for shipment to other countries, prepared for distribution abroad in an effort to stimulate export sale of seed potatoes. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Eighty Years of Foreign Trade

Reprint of article in *Canadian Geographical Journal*, which reviews development of Canada's trade between 1867 and 1947. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Reprints of Economic Reviews

Reports on the following countries, reproduced originally in the *Commercial Intelligence Journal and Foreign Trade*: Argentina, Australia, British West Indies and British Guiana, French North Africa, India, Iran, New Zealand. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Reprints of Special Articles

Articles on the following subjects, published in *Foreign Trade*, have been reprinted in pamphlet form, and may be obtained from the Publicity Division, Foreign Trade Service, Ottawa:

Assistance Available from Trade Commissioners
Branch Plant Expansion Encouraged
Canadian Port Facilities Aid Foreign Trade
Canadian Toy Industry
European Recovery Program Related to Canadian Economy
Foreign Import Controls and Exchange Regulations
Import Control of Capital Goods Under Emergency Act
Industrial Development in Canada
Influence of Geography on Import Trade
Production of Sports Equipment in Canada
Trade Procedure for American and British Zones in Germany

Trade Bulletins and Reports

Detailed information on foreign trade is compiled by Dominion Bureau of Statistics, being issued on a monthly, quarterly and annual basis. The Dominion Statistician is also responsible for compilation of the *Canada Year Book;* the *Canada Handbook,* the *Canadian Statistical Review* and commodity reports. Catalogue of publications obtainable from Information Service, Dominion Bureau of Statistics, Ottawa.

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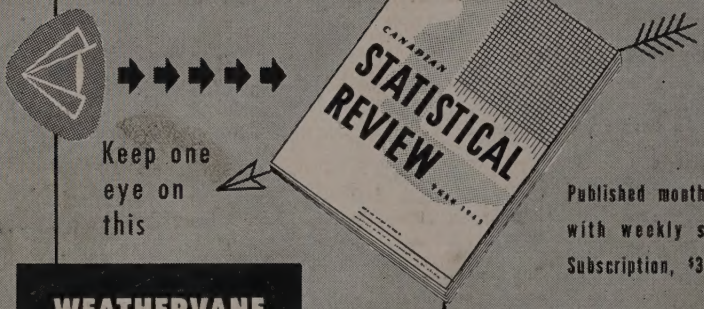

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